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acting as a thought partner to plan for what partners will do once REL supports have concluded. Another aspect of helping partners take next steps may involve reaching out to other stakeholder organizations with whom partners may not typically work. Partners for REL projects may include many, but not all, of the decisionmakers whose buy-in is necessary for achieving intended outcomes. In these cases, the REL could work in partnership to build the knowledge and capacity of partners to be able to clearly and persuasively champion potential evidence-based changes to outside decisionmakers and other stakeholders. Therefore, the REL, through partnerships, will need to become knowledgeable not only of their partners and their partners' contexts, but also of their partners' relationships to other key decisionmakers and the organizational processes of each relevant group.

**REL activities shall be designed and executed in a culturally responsive manner.** RELs shall make all necessary efforts to understand the cultural context of their partners at the state, region, district, or school level and use that knowledge to design and conduct high leverage work. Cultural context can have several meanings, but generally relates to how stakeholders interact within education and social systems and their beliefs, values, norms and behaviors. RELs should recognize that these beliefs, values, norms, and behaviors are likely to be different across the various stakeholder groups within a system. As RELs think about how to best meet their partners' needs around a given topic, they should also seek to understand the answers to questions such as: What does each relevant stakeholder group believe is the problem? What current norms might support or inhibit the adoption of a new practice or policy? What role does tradition play and how can it be used to support change?

**REL personnel shall include researchers with significant and demonstrated scholarly expertise in content areas and methodologies relevant to the work the REL undertakes as well as practitioners who have significant experience teaching and leading professional development in those content areas.** RELs shall develop a team that includes experts of several types, listed below:

- Content experts who possess a broad and deep perspective on what is known and what still is not settled in a research field. They enable the REL to frame important research questions and TCTS activities so that they both address immediate needs for evidence, as well as advance knowledge more broadly through applied research.
- Lead authors of REL reports who shall have demonstrated expertise in the content area being addressed by the report, shown through a substantial portfolio of peer-reviewed, published work in that area.<sup>17</sup>

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<sup>17</sup> See <https://eric.ed.gov/?selection> for IES' definition of peer-reviewed.

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- Methodological experts who ensure high leverage research questions are answered using appropriate methods and support the intended outcomes of the project.
- Current or recent practitioners who provide project staff additional context on problems of practice educators are facing.
- Experts in adult learning or professional development who can lead and inform the design and conduct of TCTS activities.

IES expects that the REL shall seek content expertise from a variety of sources, including universities or other firms, and shall adjust its mix of content expertise as new regional needs arise.

**REL products shall be clear, engaging, relevant, and actionable.** Products should be written for an informed lay audience. Non-researchers with limited statistical backgrounds should be able to understand key takeaways and implications from all products, including applied research. RELs shall incorporate formative feedback from at least one representative of the target audience when developing products to maximize their relevance, usability and actionability. RELs are encouraged to use multiple formats and to develop supplemental products to support research findings to make these findings as clear, engaging, relevant, accessible and actionable as possible to multiple audiences.

IES' primary concern is that the REL products are actionable for partners toward achieving their outcomes (see earlier expectation related to strategic dissemination). However, REL products should also be nationally relevant whenever possible so that other states, districts, and schools can adapt and implement the research knowledge, tools and trainings created through the REL partnership. RELs shall provide sufficient contextual information as a part of each applied research product so that users may be able to compare the context in which the work was conducted to their own when considering its relevance.

**Applied research products shall incorporate quantitative methodologies best suited to answer partners' questions and address their high leverage needs.** Applied research under the REL Program may use any quantitative methods, ranging from descriptive statistics to causal models, that are appropriate to meet partner needs. As discussed above, IES expects REL products to be high-leverage and actionable, with a focus on achieving partners' medium- and long-term outcomes. Therefore, while descriptive research is permitted, IES expects that descriptive research will not be conducted as a stand-alone project and will instead be combined with other REL supports that help partners and other stakeholders apply research evidence to policy or practice. For the purposes of research under the REL Program, qualitative research methods are typically best used in combination with quantitative methods rather than in isolation. For example, case study data can be used to provide examples of the types of implementation

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approaches that may be listed in survey response categories within an implementation evaluation.

IES encourages RELs to look for opportunities to conduct studies that build upon extant data by collecting data on implementation in real time in order to help stakeholders understand the variation in implementation, the challenges associated with implementation and educators' strategies for overcoming these challenges. Such studies would need to be launched early in the contract cycle because they would likely require Office of Management and Budget (OMB) clearance after the study proposal was approved by IES before the study could begin, as well as additional time to recruit participants and collect data.<sup>18</sup>

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<sup>18</sup> The OMB clearance process takes a minimum of five months.

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#### IV. Key outcomes for REL work and logic model

IES has identified several short-, medium-, and long-term outcomes anticipated from the work of RELs and the REL Program (see Figure 1). Given the wide variety of topics and activities of REL projects, it would be nearly impossible to capture every potential input, activity, output, and outcome of REL work. The logic model depicted in Figure 1 represents a high-level overview of the work of RELs and of the REL Program itself. IES does not include arrows linking specific inputs, activities, outputs, and outcomes in this model. However, IES' expectation is that as each REL co-develops and executes their scope of work they will demonstrate through logic models how specific components of their models are linked for each set of projects developed in partnership (see Task 3 under *Scope of Work and Requirements* for additional information).

As noted in the *Expectations for Implementation of the REL Program* section, RELs will be expected to work with their partners to co-develop and periodically update detailed logic models, theories of action or equivalent for each set of projects developed in partnership.<sup>19</sup> Measurement plans that allow the REL to quantify their progress toward achieving specified targets associated with short-, medium-, and long-term outcomes are also required. While the specific short- or medium-term outcomes in REL logic models might not match those in Figure 1, all applied research, coaching, training, and technical support activities shall be designed to support partners in meeting at least one of the five types of long-term outcomes listed in Figure 1.

##### Inputs

Although each REL project will include distinct inputs, some inputs should be common across any REL project. These include the experience and expertise in research, policy, and practice that RELs and their partners bring to a project. Partners' connections to other key stakeholders and their contextual knowledge is also a valuable input.

Buy-in on the part of partners, and the availability of REL and partner resources is also necessary. For RELs and partners, this includes time commitments necessary to be responsive to communication and participate in meetings or activities. This also includes time and effort to take the necessary steps to further project outcomes; for example, facilitating access to data for an applied research study or making phone calls to set up meetings with additional key stakeholders whose buy-in is critical for a project to meet its medium- or long-term outcomes. This may also involve financial resources, such as RELs using travel funds to accommodate a face-to-face meeting with partners, or partners paying for substitute teachers so that teacher leaders may attend a REL coaching or training session.

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<sup>19</sup> This will also be required for single (stand-alone) projects lasting more than six months; while IES expects most if not all REL work to be done through multiple projects with a set of stakeholders, IES will make limited allowances for stand-alone projects if the REL demonstrates the high-leverage nature of the proposed work.

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### **Activities and Outputs**

REL activities and outputs are described in greater detail in both the *Expectations for the Implementation of the REL Program* and *Scope of Work and Requirements* sections. While there are some broad categories of REL activities and outputs listed in the REL Program Logic Model, this is not meant to be an exhaustive list of all possible activities RELs may pursue. Similarly, RELs will have flexibility in proposing what types of outputs or products are developed within these broad categories outlined in the REL Program Logic Model so long as the content and structure of each activity and output is clearly, directly, and credibly linked to specific outcomes, particularly the medium- and long-term outcomes listed in Figure 1.

### **Short-Term Outcomes**

Short-term outcomes of REL activities usually include building partners' knowledge and/or capacity for understanding research and translating that research or evidence into practice. Capacity building may include improving partner and/or stakeholder capacity to access, analyze, and interpret data, critically examine the quality of research evidence, or effectively communicate research findings and their implications to other key stakeholders. Short-term outcomes are not limited to capacity building, but other short-term outcomes typically follow some type of increase in partner capacity. These can include, but are not limited to, partners identifying a specific practice that they wish to adopt or adapt or increased support for an evidence-informed action among key stakeholders not directly involved as partners for a project.

### **Medium-Term Outcomes**

Medium-term outcomes usually include partners or other key stakeholders taking action to change policy or behaviors, such as the adoption and implementation of a policy or practice. (Sustaining a policy or practice proven to be effective can also be a medium-term outcome.) Sustained implementation of continuous improvement processes among partners is also considered a medium-term outcome that can lead to other medium-term outcomes such as the identification, adaption, and adoption of new practices and policies. In cases where projects are completed near the end of the REL cycle, medium-term outcomes may not be observable until the end of the contract cycle.

### **Long-Term Outcomes**

As discussed under the *Expectations for the Implementation of the REL Program* section, REL outcomes and targets should be appropriately tuned to the Program's opportunities and constraints, while also being informed by partners' goals, which should act as a "north star" to inform REL outcomes.

Most REL partners' long-term goals of interest are improvements in meaningful measures of learner achievement (e.g., end-of-grade proficiency tests, graduation, or entering the workforce). Those goals typically have distinct numeric targets partners hope to achieve. Other long-term goals may include sustained, systematic organizational change and improved educator effectiveness, precursors to the learner academic, behavioral, or workforce outcomes that are

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typically of interest to state and local practitioners and policymakers. Often, partners cast these goals and their associated targets as being in the more distant future, years after the REL contract will end.

While acknowledging that partners' long-term goals of interest may not be achievable within the timeline of the REL cycle, RELs should identify targets for their projects' long-term outcomes that are (1) consistent with the partner's long-term goal but (2) *attainable within the period of performance*. Per the example mentioned under *Highlighted Expectations for the Implementation of the REL Program*, a partner might set a districtwide proficiency rate target of 95% by 2030 for grade 3 standardized test scores in mathematics, while the REL adopts a long-term outcome of a demonstrable increase in student growth by the end of the REL period of performance relative to the students' baseline on all relevant domains of the mathematics progress monitoring assessment for 3<sup>rd</sup> grade in all elementary schools in which teachers participated in trainings during the 2023-24 school year. The REL would be expected to report both students' baseline scores and the latest available student scores at the end of the contract period. The target associated with the long-term outcome should be specific and narrow, yet aligned to the partner's long-term goal, with the presumption that a successful districtwide scaling effort would allow the district to achieve their long-term goal by 2030.

Offerors are encouraged to identify high-leverage projects, or sets of projects, to be done in partnership as early as possible in the contract cycle so that there is sufficient time in the REL contract to support the partners in achieving the medium- and long-term outcomes. However, RELs may propose sets of related projects to be done in partnership that include individual projects which may not be completed until the last few months of the REL contract, meaning that there may not be time to examine the associated long-term outcomes of that project. Such projects are allowable on a limited basis so long as the REL demonstrates the high-leverage nature of the proposed work and clearly outlines actions their partners are likely to take on their own after the REL contract expires to support their long-term outcomes. RELs are still expected to identify their partners' long-term outcomes and targets beyond the REL cycle even in such cases.

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**Figure 1. REL Program Logic Model**

Problem statement: States, districts, and schools across the Pre-K-20 spectrum have goals related to improving student outcomes. Many states, districts and schools are interested in, or sometimes required to, implement evidence-based policies and practices as a way of reaching those goals. RELs are in a position to leverage their research expertise and their partners’ contextual knowledge to build partner and/or stakeholder capacity to determine and implement evidence-informed actions that ultimately support the improvement of student outcomes. While this model is intentionally general as it relates to the outputs, short- and medium-term outcomes of REL work, all REL projects should have at least one of the five types of long-term outcomes in this logic model. That outcome should be specific and measurable.



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## **V. Scope of work and requirements**

### **Task 1: REL Management and Reporting**

#### ***Subtask 1.1 Participate in a kickoff call with ED and attend a REL kickoff meeting.***

Within one week after the effective date of the contract, the REL shall schedule a call with the IES's Contracting Officer's Representative (COR), Contracting Officer (CO), and Contract Specialist (CS) to introduce the key personnel and discuss expectations of the in-person program-wide kickoff meeting to be held within five weeks of contract award. The REL shall bring three personnel, including the Director and Deputy Director, to meet in Washington, DC with the COR, CO, CS for the contract kick-off meeting. Within two weeks after the meeting, the REL shall submit a summary of the meeting discussions, including any outstanding issues raised and plans to address these issues.

#### ***Subtask 1.2 Communicate regularly with IES.***

The REL – at a minimum, the Director and Deputy Director – shall participate in regularly scheduled (at least twice per month) meetings with the COR to discuss issues related to the REL contract, including any anticipated problems and proposed solutions to those problems, and update the COR on key milestones for REL projects. The REL shall send an agenda for the call at least two working days before each call so that both the REL and COR are aware of the main issues that will be addressed during the call. Within five working days following each meeting, the REL shall prepare a memo summarizing the key issues and concerns raised at the meeting and how each will be addressed.

The Director or Deputy Director shall communicate with the COR on a regular basis, such as by phone or email, to discuss urgent points and follow-up as needed.

#### ***Subtask 1.3 Attend biannual REL Program meetings.***

The REL – specifically, the Director and one other key personnel<sup>20</sup> – shall attend two, one- to two-day REL Program meetings. Meetings may be in person in Washington DC, or virtual. The first REL Program meeting will be in person. The purpose of these meetings is to discuss issues and accomplishments related to the REL and the REL Program and consider ways to improve the functioning or outcomes of the REL Program. IES will coordinate the logistics for this REL Program meeting.

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<sup>20</sup> The REL Director, Deputy Director, and task leads are considered key personnel for the REL contracts.



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***Subtask 1.4 Present REL portfolio annually to Department staff.***

The REL shall present current and proposed work to REL Program and other invited IES and Department of Education staff in Washington, DC annually beginning in Year 2 of the contract. The purpose of the presentation is to ensure that other Department staff are aware of REL work and can discuss how this work connects or could potentially connect with other Department work. The REL shall submit briefing materials to the COR at least three weeks before the meeting. At least three REL staff shall plan on attending the one-day meeting. Within one week of each portfolio presentation, the REL shall submit a summary memo of items discussed at the meeting.

***Subtask 1.5 Identify, establish, maintain, and convene the Governing Board.***

The REL shall effectively manage all tasks with guidance from a statutorily required Governing Board, as specified in Section 174(h) of ESRA. The REL shall appoint members to the REL Governing Board to meet the following requirements:

- The composition of the REL Governing Board shall represent the interests of all states and other appropriate constituencies in the region.
- The REL shall offer every chief state school officer in the region the opportunity to serve on the REL Governing Board, or to designate a personal representative to serve.
- The composition of the REL Governing Board shall include a diversity of expertise and experience, including education researchers, educators, and individuals representing the interests of learners in economically disadvantaged areas, both rural and urban, and other underserved learners; see Section 174(h) of ESRA for additional information on the composition of the Governing Board.
- The REL Governing Board shall be separate from the REL's corporate board and shall meet on a different day from any corporate board meeting.
- The REL Governing Board shall convene at least two times each year, with at least one in-person meeting.<sup>21</sup> Additional meetings of the REL Governing Board may be conducted as needed. In-person meetings shall be at least one full day to allow ample time for the board to fulfill its duties. All in-person meetings shall be held at a location within the region.

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<sup>21</sup> "In-person" Governing Board meetings may be hybrid (in-person with an option to attend virtually) if necessary to improve attendance.

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- The REL shall ensure that members clearly understand the roles, responsibilities, and the procedures of the REL Governing Board. This includes ensuring that all REL Governing Board members are onboarded, and are kept informed of the work of the REL between meetings so that the REL Governing Board may maximize the time available during Board meetings to fulfill their responsibilities, including:
  - Identifying and sharing the needs of the education constituency they represent with the REL.
  - Providing strategic guidance on REL work and how the REL shall carry out its activities for maximum effectiveness and efficiency towards addressing regional needs and fulfilling intended outcomes, reduce unnecessary activities and/or activities redundant with other activities in the region, increase collaboration and resource sharing, and other activities as specified in Section 174(h) of ESRA. Governing Board members are expected to provide timely input and guidance on the needs and projects that impact the constituency they represent.
  - Leveraging their connections within the region to amplify products developed by RELs and the WWC to relevant stakeholders or organizations.

RELs shall provide Governing Board members the opportunity to provide meaningful input and guidance on projects that impact the constituency they represent, as those projects are being proposed and executed. Because the work of the REL will be proposed, approved, and executed on a rolling basis, biannual Governing Board meetings should not be the only opportunity Governing Board members have to provide such input and guidance. RELs are expected to communicate with their Governing Board members on a consistent basis to provide them the information they need to fulfill their duties in a timely manner.

Within five weeks of the effective date of the contract, the REL shall submit to IES a report on the establishment of the REL Governing Board, board procedures, a list of members, and analysis of how the Governing Board meets the representational requirements.

The first REL Governing Board meeting shall be held within the first ten weeks of the contract effective date. After the initial meeting, meeting agendas shall be created in consultation with the Governing Board members at least 6 weeks before the Governing Board meeting occurs. The meeting agenda shall reflect a commitment by the REL to engage the Governing Board members actively in the decision-making of the REL. The agenda and meeting materials shall be submitted for approval by IES at least three weeks before each meeting. The REL shall submit to

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IES minutes, actions, and a discussion of how the REL will use Governing Board feedback to adjust their proposed or ongoing work within two weeks after each meeting.

RELs shall also keep their COR informed of potential additions to or resignations from their Governing Board. While the addition of new Governing Board members must be approved by current Governing Board members, RELs shall propose new Governing Board members to the COR in advance of proposing members to the Governing Board, and provide the COR with a justification as to why a potential Governing Board member is well situated to further the work of the REL.

***Subtask 1.6 Submit a Bi-annual Assessment of Progress Report.***

The Bi-annual Assessment of Progress will serve as a living document that provides the most up-to-date information about the REL's work. The Bi-annual Assessment of Progress should offer a retrospective review of the REL's work to date, with a short depiction of next steps if the partnerships or projects lend themselves to future work. RELs will not propose new work in the Bi-annual Assessment of Progress, as RELs are permitted and encouraged to propose new projects throughout the year as needs in the region arise.

The REL shall use the plan included in the contract proposal to inform the first Bi-Annual Assessment of Progress, with more guidance to follow post award. This initial report will not require an assessment of progress or lessons learned from collaborating and coordinating with partners. In subsequent submissions, each task will be updated. Tasks 1 and 2 will likely require minimal updates. The remainder of the Bi-Assessment of Progress will be organized by sets of projects in partnership and it shall include, but may not be limited to: (1) a description of approved and active partnerships; (2) the composition of each partnership; (3) a logic model and accompanying narrative that depicts and describes relationships between projects and their alignment to short-term, medium-term, and long-term outcomes of the partnership; (4) measurable targets for each outcome; (5) a measurement plan aligned to each outcome; and (6) an assessment of progress toward meeting partnerships' short-term and medium-term outcomes and targets, (7) lessons learned from collaborating and coordinating with partners; and (8) the names partnership leads and principal investigators for new research, training, coaching, and technical support projects. Any projects that are not associated with an approved partnership shall be organized by jurisdiction. RELs shall include information for non-partnership projects similar to what is required for the partnership projects, with the exception of the logic model requirements.

The first Bi-Annual Assessment of Progress is due within 14 weeks of the contract effective date. All subsequent Bi-Annual Assessments of Progress will be due every six months (each October and April) through April 2026. The COR will review and provide initial comments within three weeks of submission. The REL shall assume at least one round of revisions to the initial report and subsequent Bi-Annual Assessments of progress, with revised versions of the report to be submitted within two weeks of receiving COR feedback until the report is approved.

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***Subtask 1.7 Prepare and submit Monthly Progress Reports***

The REL shall submit a Monthly Progress Report, due within 10 working days after the end of each month. The Monthly Progress Report shall include the following summaries:

- Major activities under each task and accomplishments—including any relevant data on progress towards partnerships’ targets.
- Needs related to applied research or training, coaching, or technical support that have been identified by the REL through its interactions with regional stakeholders.
- Participation in cross-REL coordination activities.
- Coordination and collaboration with Comprehensive Centers, other Technical Assistance Providers, and other IES investments as well as referrals to other Department resources the REL has provided to stakeholders.
- Budget and expenditures for the period and cumulatively by Subtask, and by project under Tasks 4 and 5, with a clear identification of the extent of budget devoted to and resources spent on activities in rural areas. The budget and expenditure documents shall clearly indicate the labor hours spent on each Task and Subtask during the prior month and cumulatively since the project began by individual staff. In addition, under Tasks 4 and 5, the budget documents shall indicate the expenditures and labor hours spent for each project by individual staff during the prior month and cumulatively since the project began.
- Unexpected challenges, delays, or other issues that need to be addressed. If these delays result in revisions to the project timeline, RELs shall include a complete timeline for remaining project activities in the Monthly Progress Report.
- Major activities planned for the next month, including a schedule of deliverable submissions.

***Subtask 1.8 Submit performance data relevant to the Department’s strategic plan.***

IES is required to submit an Annual Performance Plan (APP) with its annual Budget request to Congress. The APP identifies performance measures to accomplish the strategic objectives represented in the Department’s [Strategic Plan](#). The REL shall submit project-level data, up to five times a year, on performance measures identified by the COR. Specific reporting guidance will be provided by IES.

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***Subtask 1.9 Comply with IES' REL Employee Personnel Security Clearance Policy.***

All REL positions will be designated as either a no-risk, low-risk or moderate-risk level. Within the first week of the contract start date the REL shall appoint a security liaison who shall submit a list of all staff on the contract with the appropriate position risk level designation. The REL security liaison shall submit the required documentation for all REL staff assigned a low or moderate risk to the IES security team within two weeks of contract start date, and as needed for REL staff added over the life of the contract.<sup>22</sup> The security liaison shall be responsible for submitting the required documentation for staff from the prime contractor and any subcontractors. Additionally, REL staff shall complete periodic cybersecurity and records management training provided by IES. See Appendix D: Records Management Obligations for more information.

***Subtask 1.10 Participate in REL Program Evaluation.***

IES intends to conduct an independent evaluation of each REL and the REL Program itself. The REL shall cooperate with IES' requests for information and other types of assistance needed to conduct the evaluation. Information requests and assistance may include, for example, providing details about upcoming and past TCTS activities or facilitating the evaluation contractor's collection of data from REL partners. In addition, the REL shall plan to participate in two-day site visits from REL evaluation contractor staff in both Years 2 and 3 of the REL contract. Three REL staff shall participate in the two-day site visit, including both the Director and Deputy Director as well as one additional person to be determined in Year 1. The REL shall also be prepared to discuss with the REL evaluation contractor the feasibility of conducting a random controlled trial (RCT) or quasi-experimental design (QED) study of one of the REL's partnerships or projects. This discussion would occur in Year 1 of the REL contract and the RCT or QED would begin in Year 2 or Year 3 of the REL contract. The REL shall cooperate with the REL evaluation contractor in the implementation of this RCT or QED if such a study is deemed feasible.

***Subtask 1.11 Prepare and submit final contract report.***

Four months before the end of the period of performance, the REL shall submit a draft report that describes its key accomplishments and success in meeting targets established for partnerships' short-term, medium-term, and long-term outcomes of interest. For outcomes that are outside the timeframe of this contract, the REL shall provide information on their partners' plans to achieve these outcomes. IES will provide additional guidance on the specific format and content of the report. The final report is anticipated to be no more than 40 pages in length.

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<sup>22</sup> See Appendix F of the Instructions to Offerors for additional information on personnel security and clearance policy.

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The COR will review the report and provide comments within four weeks. The REL shall incorporate the COR's comments for the final report. The final report shall be submitted two months before the end of the contract period.

### ***Task 1 Deliverables***

Table 1 provides a list of required deliverables for work conducted under Task 1, as well as their due dates. RELs and IES may negotiate on to add deliverables as appropriate.

**Table 1: Task 1 Deliverables**

Subtask	Deliverables	Due Date
1.1	Summary of REL Kickoff Meeting	2 weeks after the kickoff meeting
1.2	Communicate regularly with IES	
	Biweekly/Bimonthly call agenda	2 working days before each meeting
	Biweekly/Bimonthly call summary memo	5 working days following each meeting
1.4	Present REL portfolio annually to Department staff	
	Department presentation briefing materials	3 weeks before each meeting
	Summary of presentation to the Department	1 week after each meeting
1.5	Identify, establish, maintain, and convene the Governing Board	
	Report on the establishment of the Governing Board	Within 5 weeks of the effective date of the contract
	Meeting agendas and materials for Governing Board Meeting	3 weeks before the meeting
	Governing Board meeting minutes, action items and discussion of how the REL will use Governing Board feedback to adjust their proposed or ongoing work	2 weeks after each meeting
	Submission of proposed Governing Board members to fill vacancies	As needed
1.6	Bi-annual Assessment of Progress Report	Within 14 weeks of the effective date of the contract, the first working day of October and April through April 2026
1.7	Monthly Progress Report	Within 10 working days after the end of each month
1.8	Performance reporting	As requested
1.9	Submission of security documents for low- and moderate-level clearances	Within two weeks of the effective date of the contract, as needed
1.10	REL evaluation materials	As requested
1.11	Final contract report	Two months before the end of the period of performance

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## **Task 2: Coordination and Collaboration**

Individual RELs shall coordinate and collaborate with other RELs. Individual RELs should also coordinate with other U.S Department of Education-funded centers and technical assistance entities, including Research and Development (R&D) centers funded by IES and the regional and national Comprehensive Centers. The key purposes for this coordination and collaboration are to share and synthesize information, ideas, and lessons learned; to enable each type of provider to focus on its designated role; to ensure that work is non-duplicative; to streamline and simplify service provision to states and districts; and to collaborate on projects in order to better support regional stakeholders.

### ***Subtask 2.1 Lead topically driven cross-REL coordination activities.***

Each REL shall be responsible for developing, coordinating, reporting, and promoting REL activities on one non-overlapping topic in education (“leadership area”) that has both regional and national importance. Work within this Subtask is intended to: (1) strengthen and leverage the knowledge and experience across the REL Program on a topic, (2) increase collaboration and coordination across all RELs, and (3) generate Task 4, Task 5, and Task 6 products that benefit the REL Program, REL partners and education stakeholders broadly.

After contract award, IES will identify one leadership area for each REL. After being assigned a leadership area topic, the REL shall lead the design and execution of activities like those described below. All cross-REL activities or products for a REL’s leadership area shall be proposed to and approved by their COR.

RELs may be asked to present cross-REL activities or products from their leadership topic to program offices within the Department, including and beyond NCEE, at IES’s office in Washington, DC up to two times over the course of this contract; such activities shall also be covered under this Subtask.

#### ***Cross-REL working group meetings***

Cross-REL working group leads are responsible for scheduling and coordinating quarterly working group meetings to accomplish the goals of this Subtask. Discussion topics shall include but are not limited to discussing potential or ongoing joint cross-REL projects, understanding and documenting related work from each REL, and sharing REL or extant resources or approaches related to the topic area.

To develop shared knowledge across the program, working group leads may also plan cross-REL activities intended for REL-only audiences, including but not limited to staff participating in the working group. Examples include but are not limited to workshops on current evidence-based research presented by an expert in the field, conversations on dissemination and engagement

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strategies, or discussions about research methods common in applied research on the topic the REL is responsible for under this Subtask.

Working group meetings or REL-only activities can occur virtually or in person; however, in-person meetings or REL-only activities may only be proposed if they coincide with an event that REL staff are already attending.

All activities under this Subtask shall be outlined in the Bi-annual Assessment of Progress and reported on in the Monthly Progress Report.

*Required external cross-REL activities or products*

Within the first 18 months of the REL contract, each working group shall develop a brief, public-facing product such as a fact sheet or brief memo providing an overview of the topic that includes relevant REL and non-REL research and technical support products.

In *either* Year 2 or Year 3 of the REL contract, each working group shall develop a public-facing product or at least one activity that highlights and/or synthesizes the work that RELs are doing across the program around the given topical area. These can also include non-REL research. Examples include, but are not limited to: a coordinated series of dissemination activities (e.g., a series of newsletters or infographics), a topical webinar series that highlights and/or synthesizes both REL and non-REL research, a cross-REL presentation at a conference, or a cross-REL event.

In *either* Year 4 or Year 5 of the REL contract, each working group shall create a public-facing product that highlights REL work in a given topical area. The product can also include peer-reviewed non-REL research relevant to the topical area. Once completed, each working group shall deliver, record, and archive a presentation on the product. Potential venues include national practitioner conferences, presentations at the Department, or other sites identified in consultation with the REL COR.

*Optional external cross-REL activities or products*

In addition, RELs may, but are not required to, jointly develop an original cross-REL activity or product. Unlike the synthesis activities mentioned above, these projects are new activities such as a joint research study, tool, or TCTS project. These activities or product ideas can be formulated under this Subtask but shall be proposed and developed under the associated Task.

***Subtask 2.2 Participate in cross-REL coordination activities.***

Each REL must designate at least one person to be an active participant in each of the cross-REL leadership groups they do not lead. Participants are expected to regularly attend cross-REL meetings, be able to speak on behalf of their REL about the work occurring under the topic area, if there is any, and support the development of cross-REL products and activities. The REL shall report a summary of these activities monthly as part of the Monthly Progress Report.



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***Subtask 2.3 Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments.***

The REL shall identify opportunities for coordination, collaboration, and dissemination with other IES funded activities and other federal and local technical assistance providers. The REL shall not duplicate the information gathered or services provided by other federal or non-federal technical assistance providers. The REL shall refer stakeholders to other available resources when the stakeholders' needs are outside the scope of REL Program or when the needs can be more effectively met by others.

***Regional Comprehensive Centers***

In a joint effort with the Office of Elementary and Secondary Education's (OESE's) [Comprehensive Center Program](#), the REL shall coordinate and collaborate with each of their regional Comprehensive Center counterpart(s) in their region in order to ensure the work of the REL contributes to the development and implementation of a cohesive and potentially deep body of knowledge nationally as well as in each region, avoids duplicating efforts across programs, and streamlines and simplifies the process of receiving federal technical support from the stakeholder perspective.

RELs and their regional Comprehensive Center counterpart(s) shall establish regular meetings, to occur at least quarterly across the entirety of the contract period, to ensure continuous coordination and potential collaboration. Discussions in these meetings shall address topics such as any new needs that arise, any changes occurring within a state (e.g., new leadership or new policies), updates on ongoing or potential projects, and identifying any collaboration opportunities. These regular meetings can also cover planning for any collaborative projects—to be proposed under the associated REL task.

Within the first 90 days of the contract, the REL and each regional Comprehensive Center within the REL's region shall develop and sign a letter of intent that outlines how the programs will meet the coordination and collaboration requirements. This letter of intent shall be updated annually, as needed.

At least once per year, the REL and its regional Comprehensive Center counterpart(s) shall engage in a joint in-person (when possible) need-sensing activity with State Education Agency (SEA) chiefs or their designees (or similar level for Washington D.C, U.S. territories and Freely Associated States) with each jurisdiction they jointly serve. These in-person meetings will allow both programs to jointly understand the high leverage needs in the state, to determine how each program can potentially address the states' needs, and to more seamlessly coordinate any potential cross-program support. In January of Year 2 through Year 5, RELs shall develop an annual memo outlining the findings from the REL and Regional Comprehensive Center's previous year of needs-sensing activities by jurisdiction, and actions RELs and regional Comprehensive Centers are taking or plan to take to address identified needs. The findings of these memos shall be presented to REL and Comprehensive Center staff at the Department via

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conference call or webinar within eight weeks of memo's submission to ED. RELs and regional Comprehensive Center staff may request follow-up meetings as needed to update the Department on actions taken by the RELs and regional Comprehensive Centers to address identified needs.

All coordination and collaboration shall be outlined in the Bi-annual Assessment of Progress and reported on in the Monthly Progress Report.

#### *Other Technical Assistance Providers and IES Investments*

The REL shall establish formal or informal structures to maintain a clear, thorough, and up-to-date knowledge of the work occurring in the network of organizations that provide different forms of research assistance to stakeholders. This network shall include other IES investments such as the WWC, research projects funded by the National Center for Education Research (NCER) and the National Center for Special Education Research (NCSE), National Center for Education Statistics (NCES) programs, such as the National Forum on Education Statistics, as well as other federal, local, and professional organizations that provide educational services to state, local education, and postsecondary agencies that align with the outcomes of REL partnerships.

Structures can include informal or formal meetings with other providers, IES contractors, or grantees in order to discuss any relevant needs-sensing, any research or activities occurring in each respective program, and any coordinated dissemination opportunities. At a minimum, internal structures shall be developed by the REL to allow the REL to identify research or other products and supports developed by all relevant networks. Strategies shall be developed for helping stakeholders make effective connections with these other services to avoid duplicative efforts.

All coordination and collaboration shall be outlined in the Bi-annual Assessment of Progress and reported in the Monthly Progress Report, which shall include a summary of the collaboration and referrals that have been made each month.

### **Task 2 Deliverables**

Table 2 provides a list of required deliverables for work conducted under Task 2, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

**Table 2: Deliverables under Task 2**

Subtask	Deliverables	Due Date
2.1	Lead cross-REL coordination activities	
	Cross-REL meeting agenda and materials	2 weeks before the meeting
	Cross-REL meeting summary	2 weeks after the meeting
	Proposal for Cross-REL, REL-only event	As needed
	Agenda and materials for cross-REL, REL-only event	3 weeks before event
	Summary of cross-REL, REL-only event	2 weeks after the event
2.1	Cross-REL infographic or newsletter	

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	Proposal (infographic only)	As needed
	Infographic or newsletter	As proposed
2.1	Cross-REL webinar	
	Proposal	As needed
	Materials and agenda	3 weeks before the webinar
	Summary of Stakeholder Feedback Survey results	2 weeks after the webinar
	Event summary	2 weeks after the activity
	Event recording	2 weeks after the activity
2.1	Cross-REL video	
	Proposal	As needed
	Script and story board	As proposed
	Video	As proposed
2.1	Cross-REL conference presentation	
	Proposal	As needed
	Agenda and materials	3 weeks before the presentation
	Summary of conference presentation	2 weeks after the presentation
	Summary of Stakeholder Feedback Survey results	2 weeks after the presentation
2.1	Presentation to the Department	
	Agenda and materials	3 weeks before the presentation
	Summary of presentation to the Department	2 weeks after the presentation
2.3	Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments	
	Signed letter(s) of intent with each regional Comprehensive Center in REL region	Within 90 days of the effective date of the contract, updated as needed in contract years 2 – 5
	Joint needs sensing summary memo	Annual, no later than January 31st in contract years 2 – 5
	Joint needs sensing summary meeting minutes	As needed, within 8 weeks of joint needs sensing summary meeting

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### **Task 3: Working in Partnership with Stakeholders**

A primary goal of the REL Program is to improve outcomes for learners through increasing the generation and use of research evidence in education practice and decision making. To achieve this goal, the REL shall develop and conduct all applied research, training, coaching, and technical support work in partnership with the stakeholders the work is intended to serve.

#### **Subtask 3.1 Conduct needs-sensing and develop partnerships.**

Throughout the duration of the contract, the REL shall engage in needs-sensing through communication with stakeholders in its region and secondary information sources such as state or district websites.

As described in the *Expectations for the Implementation of the REL Program* section, all REL work shall be planned and conducted in partnership and shall be informed by those partners' needs and desired outcomes. Additionally, RELs shall seek opportunities to engage students, parents, and community stakeholders from historically underserved groups when possible to identify and address issues related to educational equity. RELs may convene new partnerships or join established stakeholder groups. All materials developed for needs-sensing meetings with potential partners shall be submitted to the COR at least two weeks before each meeting.

For any partnering group for which more than one project across Task 4 and/or Task 5 is planned, or any group for which one Task 4 or Task 5 project is planned that will last six months or longer, the REL shall submit a partnership proposal alongside the concept paper<sup>23</sup> for the first project with this partnership. The partnership proposal will describe the overall focus of the work, the specific high-leverage need the work will address, an overview of how the need will be addressed through the REL's support, relevant context such as existing efforts outside the REL to address the need, and the individual members that will participate. Partnership proposals must include a letter of support from each organization that will participate to indicate that the approach is feasible and will meet their needs. RELs shall report on identified regional needs, including the source used to identify each need as part of their Monthly Progress Report.

Although partnership proposals are required under the conditions set forth in the previous paragraph, please note that once a REL establishes a partnership with a group of stakeholders,

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<sup>23</sup> A concept paper is a short (no more than five pages, single-spaced) document that serves as a high-level overview of proposed work. Concept papers must be approved by the COR before RELs invest the resources to develop a full proposal for a TCTS or applied research and development project. Concept papers typically include information on the high-leverage need to be addressed, scope of work, audience of the work, explanation of how the proposed work will support a partner's short-, medium-, and long-term targets, and a preliminary timeline and budget that can be updated in a full proposal.

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the partnership is not required to continue for the entirety of the five year contract cycle<sup>24</sup>. Further, RELs are not required to propose a fully fleshed out set of projects when they begin work on an initial project with partners. IES expects that some partners will wish to begin work in partnership with a REL with a single, small-scope project. As such, RELs may submit partnership proposals once it is clear that the work done in partnership with a set of stakeholders will meet the criteria for a partnership proposal, even if work on a single project has already been approved to begin.

Once a partnership proposal is approved, the REL shall develop a partnership-level logic model (or equivalent) that outlines how the proposed activities done in partnership will lead to the attainment of the intended outcomes. Each logic model shall describe each of the applied research, training, coaching, and technical support projects the REL intends to undertake in partnership; the intended outputs; short-, medium-, and long-term outcomes of the work; and the intended, measurable, time-bound targets for each outcome. In order to assess the REL's progress toward the outcomes identified in the logic models and their associated targets, the REL shall also develop a measurement plan to determine progress toward and achievement of each target associated with a logic model outcome. IES expects that RELs will collect data related to measuring progress towards specific targets as often as is needed to determine whether they are being met, for example through Stakeholder Feedback Surveys (SFS) after dissemination or TCTS activities are completed (RELs may also use other data sources, including extant data or data the REL collects outside of the SFS).<sup>25</sup> IES expects the process of developing a partnership-level logic model and measurement plan with partners to be brief – measured in weeks, not months – in order to maximize the time stakeholders have available to complete the work.

### **Subtask 3.2 Maintain partnerships established under Subtask 3.1.**

RELs shall continue to conduct ongoing needs-sensing with partners, convene meetings with partners that are not specific to a single ongoing project<sup>26</sup>, and regularly communicate with the partners in order to progress the work toward the intended outcomes and associated targets under this Subtask. All materials developed for meetings with partners under this Subtask shall be submitted to the COR at least two weeks before each meeting. RELs shall summarize these

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<sup>24</sup> RELs may propose a limited number of “one-off” projects provided they demonstrate that they are high-leverage. Additionally, RELs may propose sets of projects in a partnership proposal that will last longer than 6 months but not the entirety of the REL contract.

<sup>25</sup> IES requires that RELs administer a Stakeholder Feedback Survey (SFS) annually to partners, and to participants of Task 6 dissemination activities and Task 4 TCTS activities at the end of the activity. When possible, RELs shall also administer a follow-up SFS to participants of TCTS activities at least 6 months after the conclusion of the activity. The purpose of the SFS is to inform future projects and measure stakeholders progress towards their intended outcomes. IES will provide RELs with a menu of SFS questions to select from based on the specifics of that project; RELs will not be expected to develop their own SFS questions.

<sup>26</sup> Meetings that are specific to a single project under Task 4 or Task 5 should be included in the budget for that project.

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meetings through their regular bi-monthly or bi-weekly calls with CORs and through their Monthly Progress Report.

The logic models and associated measurement plans developed under Subtask 3.1 are to be considered living documents that change as conditions warrant. RELs should use these logic models as one tool to keep their current and future work focused on the outcomes, or to document new outcomes as necessary. The logic models and measurement plans shall be reviewed with partners, updated, and submitted to the COR biannually at a minimum through Bi-annual Progress Assessments. However, efforts towards maintaining or updating partnership-level logic models and measurement plans should be included under this Subtask.

The REL shall also administer a partnership-level SFS to all partners on an annual basis.

***Subtask 3.3 Establish and maintain communities of practice (not required).***

If a REL 1) is working in partnership with separate groups of partners within or across states that are focused on similar or related topics; and 2) determines that these groups would benefit from learning or working together, the REL may, but is in no way required to, propose one or more communities of practice (COP). The proposal should justify the size, scope, and high-leverage topic of the COP. The primary purpose of a COP should be to facilitate sharing of information, ideas, lessons learned, etc. among members through periodic meetings. While most of the REL's work should be developed and conducted to serve their partners' specific needs, some limited TCTS, applied research, or tool development work may also be conducted with multiple partners under the appropriate Task, facilitated through a COP. As with all proposed work, this will require the REL to demonstrate to IES that the work meets the criteria of "high-leverage."

Once a COP is established, RELs shall conduct ongoing needs-sensing, convene COP meetings, and regularly communicate with COP members in order to serve its members' needs. COP meetings should be summarized during the REL's regular check-in calls with their COR, and through their Monthly Progress Report. Once established, a COP need not be maintained throughout the duration of the contract period. Its focus may shift, or it may be discontinued if COP members determine that the COP is no longer needed.

**Task 3 Deliverables**

Table 3 provides a list of required deliverables for work conducted under Task 3, as well as their due dates. RELs and IES may negotiate to add deliverables as appropriate.

**Table 3: Deliverables under Task 3**

Subtask	Deliverables	Due Date
3.1	Conduct needs-sensing and develop partnerships	
	Partnership proposal	As needed
	Needs-sensing meeting materials	As needed; 2 weeks before meeting
	Maintain partnerships developed under Subtask 3.1	

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3.2	Partner planning meeting materials	As needed; 2 weeks before meeting
	Stakeholder Feedback Survey of partners	November 30 <sup>th</sup> of each contract year
3.3	Establish and maintain communities of practice (not required)	
	Community of practice proposal	As needed
	Community of practice meeting materials	As needed; 2 weeks before meeting

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#### **Task 4: Training, Coaching, and Technical Support (TCTS) for Evidence Use**

The REL Program’s training, coaching, and technical support (TCTS) projects and activities leverage RELs’ unique expertise in designing and interpreting rigorous research, as well as the identification and application of evidence-based practices. Under this task, RELs shall identify, develop, and implement TCTS projects and activities that incorporate, build, and support partners’ individual and organizational knowledge and capacities in service of addressing high leverage issues within the REL region. TCTS projects and activities shall be co-developed with partners, be more intensive than activities under other tasks such as Dissemination, and incorporate partners’ specific contexts within their design. To the greatest degree possible, TCTS should be embedded within recipients’ settings and their existing structures for determining and implementing policies or practices. Whenever feasible, RELs should also incorporate the perspectives and needs of student, parent, and community-based partners when developing and executing TCTS projects.

IES expects RELs to use TCTS projects to supplement and support projects under the *Applied Research and Peer Reviewed Research-based Development Projects* Task (Task 5) where appropriate. Blending supports across tasks maximizes the chances of the work achieving its short-, medium-, and long-term outcomes. For example, TCTS projects can occur before or during an applied research project to help partners understand existing evidence or collect more detailed, local data to support a research project on the high leverage topic of interest. TCTS projects may also occur after an applied research project is completed with the goal of exploring implications of the research and potential next steps towards meeting partners intended outcomes.

##### **Subtask 4.1 TCTS Projects**

###### *Training*

RELs are uniquely suited among the Department’s technical support network to provide intensive *training* that increases the individual and organizational capacity of partners and/or stakeholders to effectively apply research evidence to practice and supports partners in identifying and fulfilling next steps to achieve their short-, medium- and long-term outcomes. Training activities involve hands-on, direct guidance or instruction from experts in research or practice. Examples of training activities include, but are not limited to, virtual trainings for administrators or teacher leaders on applying recommendations from a WWC Practice Guide or other rigorous extant research to professional development, in-person trainings for state-level staff on promising school turnaround practices, or training staff from partner organizations in the effective distillation and communication of research evidence on a specific high leverage topic.



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### *Coaching*

RELs are also uniquely suited to provide *coaching* that supports decisionmakers in applying research evidence to inform high-leverage decisions and actions. Coaching in this context is akin to being a “thought partner” or “critical friend” to individual partner organizations or a small group of individuals representing multiple partner organizations during the process of making decisions related to policy or practice. For example, coaching support can entail co-developing materials or other outputs with partners to encourage and support evidence-informed, partner-driven changes to policy or practice. Coaching supports partners’ decision-making through ongoing sessions covering research evidence or current practice related to a specific topic.

### *Technical Support*

RELs’ expertise also makes them well-situated to provide *technical support* to build partners’ capacities to perform research-related activities such as identifying, collecting, analyzing and visualizing data. Examples might include, but are not limited to (1) providing support to a research office within a partner SEA or LEA to help that office identify existing data and/or collect new data necessary for an evaluation of an existing program, (2) providing support to a research office within a partner SEA or LEA to help that office perform data analyses on a topic, or (3) supporting a partner LEA or SEA in designing a study to inform or support its implementation or a local adaptation of a evidence-based practice or policy.<sup>27</sup>

As with all REL activities, technical support should be targeted in service of partners achieving their desired outcomes in high-leverage areas. Technical support with the intent of general capacity building, absent a specific high-leverage outcome is not an efficient or appropriate use of REL funds.

### *TCTS Proposals and Projects*

As needed, the REL shall develop concept papers and proposals, and once approved, conduct TCTS activities.<sup>28</sup> TCTS activities may be proposed on a rolling basis throughout the contract, provided there is sufficient time to complete the work before the end of the contract period of performance. All concept papers and proposals will be reviewed and approved by the COR. Concept papers and proposals for TCTS activities shall identify partners by organization/office (if applicable), and the nature of their participation shall be described. When proposing a TCTS project, RELs shall describe how the activity or activities that comprise the project will help facilitate partners’ desired short-, medium-, and long-term outcomes. Projects whose content and

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<sup>27</sup> All *applied research* shall be performed under Task 5. However, RELs may work together with partners under this task to help develop code and/or co-analyze data for the sole purpose of building partner capacity to do such analyses independently. These types of technical support activities must be scaffolded. They may not consist of a REL analyzing data on its own and providing results to partners absent any capacity-building activities.

<sup>28</sup> See Task 3 (Working in Partnership with Stakeholders) of the Scope of Work for a description of a concept paper. Concept papers must be approved by the COR before RELs invest the resources to develop a full proposal for a TCTS project.

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design is not anchored by partners' outcomes are unlikely to meet the criteria of high leverage. As part of a project's design, RELs shall collect or help partners identify and collect information necessary to determine whether the outcomes and associated targets for the project were met. All TCTS project proposals shall include a realistic and feasible timeline for completion within the contract period. TCTS proposals shall also include the proposed labor hours and costs for the project.

TCTS activities and related materials shall be informed by the highest quality, most rigorous available research. RELs shall emphasize the extent and quality of existing research on the topic of interest within all TCTS activities. When designing and proposing TCTS projects, IES expects RELs to think deeply about both the content and the design of their support. RELs should draw on research on effective professional development, capacity-building support, and adult learning theory as well as develop and assess new structures of support in order to meet their partner's needs. For example, research and literature points to the importance of stakeholders learning in the contexts in which they work (Elmore, 2004<sup>29</sup>; Pfeffer and Sutton, 2000<sup>30</sup>) and engaging stakeholders in activities that allow them to think critically about new knowledge (Yarbrough, 2018<sup>31</sup>). If a medium-term goal of the project is for recipients of TCTS to apply knowledge learned to their practice, RELs should seek to embed their support in TCTS recipients' actual setting or a similar context and provide critical thinking opportunities.

#### *Quality Assurance for TCTS Activities and Projects*

TCTS project teams shall include content experts who have made meaningful contributions in a field relevant to the TCTS activity, either through authoring published research or practitioner guidance. TCTS project design and materials should also be internally reviewed by experts in adult learning or professional development. In cases when RELs and their partners are conducting TCTS activities directly with educators, the RELs are encouraged to have at least one representative of the target audience co-develop or provide an internal review of the TCTS proposal and materials before submission to IES in order to maximize relevance, usability and actionability. This individual may be a current or former educator and may be REL staff. The REL shall also ensure that project teams include personnel with appropriate cultural understanding, content knowledge, and methodological expertise to conduct careful reviews of proposals and products before submission to the COR. In addition, the REL shall ensure that all products receive extensive editorial attention with an emphasis on plain language.

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<sup>29</sup> Elmore, R. (2004). *School reform from the inside out: policy, practice, and performance*. Cambridge, MA: Harvard Education Press.

<sup>30</sup> Pfeffer, J. & Sutton, R. *The Knowing-Doing Gap: How Smart Companies Turn Knowledge into Action*. Boston, Mass: Harvard Business School Press.

<sup>31</sup> Yarbrough, J. (2018). [Adapting Adult Learning Theory to Support Innovative, Advanced, Online Learning – WVMD Model](#). *Research in Higher Education Journal*, 35.

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In addition to the internal quality assurance procedures listed above, the REL shall propose an external subject matter expert (SME) for every TCTS project with a short-term goal of increasing stakeholder capacity to understand the extant research literature on a high leverage topic. The sole role of the SME will be to advise the project team on the design and content of evidence based TCTS activities and products. The SME must be external to the project. That is, a SME cannot work on the project (or set of closely related projects) for which they act as a SME in any other capacity. The SME may be internal or external to the prime contractor so long as she or he meets the above criteria.

The REL may propose SMEs on a project-by-project basis, or submit a running list of proposed SMEs, along with their affiliations, backgrounds, areas of expertise, and a resume or CV for pre-approval by IES. Regardless, RELs must propose a SME and provide documentation of the SME's substantive expertise relevant to the project for approval before submitting a full proposal. The REL shall also submit a memo along with the first draft of proposals or relevant project materials outlining 1) the SME's feedback on internal drafts of proposals or materials; and 2) the REL's response to the SME's feedback.

#### *Sharing TCTS materials*

RELs are encouraged to submit TCTS materials for posting on the REL website, with the understanding that materials that are very specific to a partner and/or their context may not be actionable within other contexts, and thus may not add value to a wide audience if posted. RELs shall discuss with IES which TCTS materials they anticipate will add value in posting on the REL website; however, IES will ultimately decide which materials are posted. RELs are also encouraged to consider whether any TCTS materials they develop may be widely useful if slightly modified to be less specific to a partner's context. IES expects that RELs will adapt materials to a more general context and share through the REL's website in cases where such materials are likely to be widely useful and utilized.

#### ***Subtask 4.2 Implement an "Ask an Expert" Service***

RELs shall develop and implement an "Ask an Expert" service to provide real-time methodological expertise and evidence-based thought partnering to key stakeholders within their region. "Ask an Expert" services should be limited to addressing questions that can be answered succinctly using evidence-based subject matter expertise, or expertise in designing and performing research studies. Requests related to interpretation or implementation of a policy or practice, requests where there is no directly relevant extant research to guide expert responses, requests for discussions with or presentations to a large (more than five) group of stakeholders, or requests that would require more than two meetings with the requestor to fulfill the request may not be addressed through this service and may be better fulfilled through a different REL task, or outside of the REL Program.

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IES expects that “Ask an Expert” services will not be as intensive as TCTS under Subtask 4.1. Ask an Expert services are intended to provide quick turnaround support. This Subtask may only be used for requests from key stakeholders that can be addressed within one month of receiving the request. Additionally, RELs may not use the “Ask an Expert” service to produce products typically developed under Tasks 5 or 6.

Within eight weeks of the effective date of the contract, the REL shall submit a memo to IES that outlines how the “Ask an Expert” service will be implemented. This memo must be approved by IES in advance of the REL implementing the “Ask an Expert” service. This memo should outline several aspects of their “Ask an Expert” service, including:

- A systematic internal process for determining if a request is best addressed through the “Ask an Expert” service, another REL task, or another federal service provider. For example, a request for an annotated bibliography or research references related to an education question may be referred to the [ERIC Helpdesk](#) or [National Library of Education](#). If a REL does not possess the requisite expertise or resources to answer a request either through the “Ask an Expert” service or another REL activity or the request does not fall within the scope of the REL Program, they may instead refer the requestor to another federal service provider, or to experts external to the REL in lieu of answering the question.
- A process for “Ask an Expert” requests to be received and responded to on a rolling basis.
- A process for identifying an appropriate respondent to “Ask an Expert” requests and proposing respondents for IES approval. RELs may use SMEs in this role when their expertise is relevant to the request and/or propose experts to their COR on a rolling basis.
- A close-out process for “Ask an Expert” requests. This should include development of a short summary memo of each meeting with an “Ask an Expert” requestor, to be shared with both the requestor and IES within five working days of the meeting. This should also include a process to determine whether follow-up supports are necessary. Follow-up supports may entail additional REL activities or referrals to other organizations.

IES expects that RELs will not use this service to generate additional business for their organization or their subcontractors. IES also expects that most, if not all, meetings with requestors will be done virtually. RELs may not invoice travel costs against this Subtask.

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#### Task 4 Deliverables

Table 4 provides a list of deliverables for TCTS projects under this task, as well as their due dates. Projects may (and often do) involve multiple training or coaching sessions. In such cases, RELs shall submit agendas and presentation materials to IES at least two weeks prior to each session. RELs shall also administer a Stakeholder Feedback Survey at the end of the project to all individuals who attend TCTS activities and submit the results of the survey to the COR.

Table 4 provides a list of required deliverables for work conducted under Task 4, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

**Table 4: Deliverables under Task 4**

Subtask	Deliverables	Due Date
4.1	TCTS Projects	
	Concept paper for virtual or in-person training, coaching, or technical support project	As needed
	Proposal for virtual or in-person training, coaching, or technical support project	As needed
	Materials and agenda for TCTS session	2 weeks before each session
	Stakeholder Feedback Survey results	2 weeks after the end of the project, with follow up at 6 least months after the end of the project.
4.2	“Implement an Ask an Expert” Service	
	Memo outlining how the “Ask an Expert” service will be implemented	Within 8 weeks of the effective date of the contract
	Memo summarizing “Ask an Expert” meeting	5 working days after each meeting with the requestor

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## **Task 5: Applied Research and Peer Reviewed Research-based Development Projects**

The purpose of the Applied Research and Development task is to (1) conduct applied research and report relevant findings, and (2) to develop products, subject to peer review, that are based in rigorous research be it original or extant. For the purposes of this task, “products” include reports, PowerPoint presentations under Subtasks 5.1 and 5.6 (not required), toolkits that support the instantiation of existing evidence-based practice under Subtask 5.2, documentation and materials for the design and testing of new programs under Subtask 5.3 (not required), and additional tools under Subtask 5.4 (also not required). At state and local partners’ request, products may also include any materials that result from conducting assessments of research study quality under Subtask 5.5.

All REL work under this task shall be co-developed with partners to support change processes that address localized, high-leverage problems. RELs shall describe in concept papers (when required) and project proposals how all Task 5 projects will help facilitate the key partners’ desired short-, medium-, and long-term outcomes.<sup>32</sup> As described in the *Expectations for the Implementation of the REL Program*, IES encourages RELs to propose Task 5 projects that have the explicit goal of addressing educational equity.

Although this work is listed as a separate task, it is essential that the REL work in partnership with stakeholders and collaborators to develop a cohesive set of activities. For example, the publication of a research report should never be a standalone event. Applied research, combined with dissemination, and TCTS supports before, during, and after report publication are more likely to lead to the fulfillment of the partnership’s desired outcomes than a single applied research report without accompanying activities.

### ***Subtask 5.1 Conduct original applied research and report findings.***

All research projects undertaken by RELs shall include a strong justification for the relevance and rigor of the proposed work. Applied research shall be designed to both inform short-term, high-leverage policy decisions and help build knowledge towards future decisions by practitioners or policymakers related to education policy or practice. The audience for all research projects must be clear, specific, and appropriate with respect to the intended outcomes of the project.

#### ***Develop Research Proposals***

Applied research may be proposed on a rolling basis throughout the contract, provided there is sufficient time to complete the work before the end of the contract period of performance. Proposals for research studies shall identify partners by organization/office, and the nature of

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<sup>32</sup> See Task 3 (Working in Partnership with Stakeholders) for a description of a concept paper.

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their participation shall be described. All research projects shall include a realistic and feasible timeline for completion within the contract period. All applied research projects shall be completed in time to allow RELs to support partners' and stakeholders' understanding and application of findings by providing at least one briefing for key stakeholders. The briefing should be included as a Task 5 milestone. IES encourages RELs to propose a separate TCTS project if partners and key stakeholders need additional support related to the research project. Applied research proposals shall also include the proposed labor hours and costs for the project.

The REL shall develop concept papers and proposals, and once approved, conduct research projects leading to published products. All proposals will be reviewed by the COR, peer reviewed by the REL peer-review contractor, and approved by the NCEE Associate Commissioner.

#### *Documentation for Applied Research Projects*

REL research projects are subject to the [IES Public Access Policy](#).<sup>33</sup> Causal studies that collect original outcome data are required to have [Data Management Plans](#)<sup>34</sup> that must be submitted with the proposal. Once this type of applied research proposal is approved by IES, it must be registered in the [Registry of Efficacy and Effectiveness Studies](#).<sup>35</sup> All peer-reviewed work where the Special Rights and Data clause is waived<sup>36</sup>, such as to allow RELs to publish in a journal, is subject to the [IES Public Access Policy for Publications](#).<sup>37</sup>

Additionally, the REL is responsible for ensuring that each study has the appropriate Institutional Review Board (IRB) approval. The REL shall submit documentation of IRB approval to IES as soon as possible after IES has conditionally approved the study proposal.<sup>38</sup> The REL shall not begin data collection or analysis until IES confirms with the REL that all IRB requirements have been met.

In any case in which the REL plans to recruit or collect the same data from more than 9 sources, the REL shall prepare a clearance package for IES and OMB Information Collection Review that lists the potential study participants, describes the study design and data collection instruments, and includes the necessary forms required for OMB approval. The REL shall submit the OMB clearance package to IES within one week after IES has approved the study proposal. The REL may not begin recruitment or data collection until OMB has approved the package.

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<sup>33</sup> <https://ies.ed.gov/funding/researchaccess.asp>

<sup>34</sup> [https://ies.ed.gov/funding/datasharing\\_policy.asp](https://ies.ed.gov/funding/datasharing_policy.asp) (also applies to contracts)

<sup>35</sup> <https://sreereg.icpsr.umich.edu/>

<sup>36</sup> Please note that IES very rarely waives the Special Rights and Data clause; offerors should not assume this will be done for any proposed project.

<sup>37</sup> [https://ies.ed.gov/funding/datasharing\\_grants.asp](https://ies.ed.gov/funding/datasharing_grants.asp)

<sup>38</sup> See figure E.1 in appendix E of the Instructions to Offerors for more information on conditional approval of research proposals.



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RELs shall submit all documentation for applied research projects to their COR for approval.

#### *Reporting Applied Research Findings*

RELs shall propose a reporting format that will best meet the needs of stakeholders and partners. RELs may propose a traditional report format. In this case, RELs shall prepare a report of up to 15 pages and either a one-page or a four-page summary. Traditional research reports shall meet the description, requirements, and formats described in the REL Program Writers and Style Guide. Appendices shall be published in a separate document that will not count towards the 15-page limit. Research reports must be clear and engaging, with appropriate brevity.

RELs and their partners may also propose a PowerPoint slide deck, a single or series of infographics, or other non-traditional format for sharing study results with partners and decisionmakers.<sup>39</sup> In this instance, RELs shall submit the final product along with a supporting memo that provides detailed documentation of the research study's methodology, including data and limitations. All research products will be reviewed by the COR, peer reviewed by the REL peer-review contractor (RPR), and approved by the NCEE Associate Commissioner and NCEE Commissioner. All products will be submitted to the Office of the Secretary and then posted on the IES website as 508-compliant files. RELs must explain in the research proposal why a non-traditional format is optimal for reporting the findings of the proposed research.

***Optional White Paper Publications.*** In the event partners or key stakeholders need to use research study findings to make a high-leverage decision before a report can be published by IES through the typical publication process, IES may publish a white paper version of the report at the end of Phase I review. (See Figure E2 in Appendix E of the Instructions to Offerors for information on of Phase I and Phase II of review process.) White papers serve as interim reports, which will be submitted to the Office of the Secretary and then published on the REL website and indexed in ERIC. The REL is responsible for submitting a 508c version of the report to publish on the IES website. The report will also continue through Phase II review and both the final report and the white paper will be posted on the same publication page. RELs will need COR approval in advance to access the white paper publication option for a report.

### **Subtask 5.2 Develop a toolkit based on WWC Practice Guides to support educators use of evidence-based practices**

IES is invested in developing practitioner-friendly toolkits to help educators use evidence-based practices in classrooms – from preschool through postsecondary settings. Some of the best evidence available is consolidated in the WWC Practice Guides, in which researchers and practitioners review the evidence from the most rigorous studies available, develop recommendations for practice, and create action steps for how to use the recommended practices.

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<sup>39</sup> One exception to this rule is the evaluation of a toolkit developed under Subtask 5.2 or an intervention developed under Subtask 5.3. Evaluations of these products must be shared through a traditional 15-page report and one-page summary.



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To help get this evidence into the hands of stakeholders, RELs shall partner with educators and postsecondary instructors (if relevant) to develop one toolkit based on an assigned WWC Practice Guide, which shall include all materials necessary for effective implementation.<sup>40</sup> RELs may choose to include one or more recommendations from a WWC Practice Guide in the toolkit, but RELs may not change the language of the recommendation.

### *Toolkit Components*

A toolkit must contain the following three parts:

1. **Initial Diagnostic and On-going Monitoring Instruments:** This should include at least two types of instruments that can be used for the collection of initial, diagnostic data and for the collection of ongoing monitoring data: (A) a comprehensive measurement tool such as an observation rubric or checklist that enables an educator or postsecondary instructor to assess their current/baseline practice and future practice against the practices recommended in the WWC Practice Guide; and (B) a comprehensive diagnostic that enables educators, postsecondary instructors and leaders to assess the extent to which their school and/or district support the implementation and on-going monitoring of the research-based Practice Guide recommendations included in the toolkit. RELs can use previously developed instruments or develop new ones as part of the toolkit.
2. **Professional Development Resources:** A comprehensive set of resources that help an educator or a community of educators to acquire the knowledge and skills associated with the WWC Practice Guide recommendations and to implement the Practice Guide recommendations with fidelity in a sustained fashion.

Professional development resources might include guidebooks, workbooks, professional learning community guides, self-study guides, videos that demonstrate a practice being implemented with fidelity in a classroom, practice audits, rubrics, and more. Offerors are expected to take account of potential roadblocks and solutions identified in the Practice Guide when developing resources. Examples of Professional Development Resources can be found among tools that RELs have already developed such as the following Professional Learning Community (PLC) Facilitators Guides:

- [\*Professional Learning Community: Improving Mathematical Problem Solving for Students in Grades 4 Through 8 Facilitator's Guide\*](#) (REL Southeast)

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<sup>40</sup> Some Practice Guides present a set of recommendations in which all recommendations should be implemented to achieve the intended outcomes while other Practice Guide recommendations may be implemented independently of the other recommendations. RELs must consider whether recommendations are a package of practices or a single recommendation can be implemented to achieve the intended goal when developing the toolkit.

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- [\*Professional learning communities facilitator's guide for the What Works Clearinghouse practice guide: Foundational skills to support reading for understanding in kindergarten through 3rd grade\*](#) (REL Southeast)
- [\*Professional Learning Communities Facilitator's Guide for the What Works Clearinghouse Practice Guide Teaching Academic Content and Literacy to English Learners in Elementary and Middle School\*](#) (REL Southwest)

3. **Steps for Institutionalizing Supports for Evidence-Based Practice:** In order for schools, districts, and postsecondary institutions to support educators and instructors in the implementation of evidence-based practices and to ensure that those practices are sustained over time, they will need to institutionalize support systems. These systems may include elements such as regular time for educators and postsecondary instructors (if relevant) to learn new practices, time for the monitoring of those practices by educators and leaders and the institutional structures, and resources to which educators and leaders can turn for implementation and monitoring activities and problem solving. The third part of the toolkit shall include implementation steps for institutionalizing such supports. Some of the WWC Practice Guides address the implementation of these supports in their section on implementation steps. This toolkit shall provide actionable guidance related to those steps in order to help whole schools and districts set up the necessary support systems. RELs may provide the supports needed for this step in the development and evaluation phase or they may consider partnering with another entity, such as a Comprehensive Center to provide technical support. Offerors are expected to take account of potential roadblocks and solutions identified in the Practice Guide when developing implementation steps, as appropriate.

#### *Toolkit Development and Review Process*

RELs shall develop the toolkit in consultation with partners and with the support of content experts to support the use of evidence-based practices at the classroom, school, or district level. Toolkits based on WWC Practice Guides focused on elementary or secondary learners shall be co-developed with at least one school- and/or district-level partner. Toolkits based on WWC Practice Guides focused on postsecondary learners shall be co-developed with at least one Institute of Higher Education. Other partners may be included as well.

The toolkit must focus on increasing educator (teachers and paraprofessionals if appropriate), or postsecondary instructor use of evidence-based practices but may also include resources for other stakeholders (e.g., parents, school or district leadership). Additional resources for other stakeholders shall be part of the professional development resources. To the extent possible, the toolkit shall be easily adapted to support the specific needs of a variety of audiences. The toolkit

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shall initially be developed in English and may be translated into another language after the English version has been published by IES.

Toolkits shall be developed in the format most appropriate for their audience; both print and digital options are allowable. If a REL gets approval to develop a web-based tool, the REL Website contractor will cover the programming and web development costs up to a predetermined amount. The REL Website Contract will include funds to cover a set amount of tool development costs for each REL. If a REL proposes to develop a tool (or tools) that will require more programming work than can be covered by the Website contract's budget for that REL, the REL contractor will pay for the additional required programming costs using REL funds. The REL will also be responsible for the costs of developing the content of the tool, as well as their own costs related to collaborating with the Website contractor to determine the technical requirements and test the programming. Once the toolkit proposal is submitted to IES, if it requires collaboration with the REL Website contractor, both entities along with the COR will meet for approximately one hour to discuss the scope of work and budget implications prior to the proposal being accepted.

The toolkit proposal will be submitted as part of the REL competition proposal materials. Upon award of the REL contract, successful offerors will submit the toolkit proposal to their SME for review, include the proposed labor hours and costs for the project, and then submit it to IES for COR, Associate Commissioner, and Commissioner review. The toolkit proposal will not receive RPR review. The actual toolkit will be reviewed by the COR, peer reviewed by the REL peer-review contractor (RPR), and approved by the NCEE Associate Commissioner and NCEE Commissioner.

#### *Toolkit Evaluation and Review Process*

The toolkit in Subtask 5.2 also require two forms of evaluation:

- 1) First, RELs must formatively evaluate the usability of the tool with its intended audience during development. Usability refers to the quality of a user's experience when interacting with the toolkit and includes *at least* the following two factors:
  - **Ease of use:** Whether a user can understand how to use the toolkit and can accomplish the tasks that the toolkit outlines without the assistance of the REL or another technical assistance provider.
  - **Subjective satisfaction:** The extent to which a toolkit user reports that they like using the toolkit, and would recommend the toolkit to others.

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The formative evaluation is a component of the toolkit development phase under Subtask 5.2.

- 2) Second, RELs must evaluate the efficacy and implementation fidelity of the finished toolkit's Professional Development Resources, either individually, in related subsets, or as a whole, under Subtask 5.1 prior to the toolkit's release by IES. Such an evaluation shall examine changes in teacher practice and may also include measures of teacher knowledge and/or teacher self-efficacy. The evaluation must also examine learner outcomes (e.g., academic or behavioral outcomes). The efficacy portion of the evaluation should be designed to meet What Works Clearinghouse Standards, version 4.1, to the extent practicable. IES acknowledges that these studies are exploratory in nature.

Note that partner K-12 schools or IHEs involved in the usability trials (above) may not be included in subsequent efficacy and implementation fidelity trials. For example, REL Mid-Atlantic may partner with one district and/or one school in Pennsylvania school to develop the toolkit and conduct the formative evaluation, and then partner with different schools in Pennsylvania or other states in the REL Mid-Atlantic region to evaluate the efficacy and implementation fidelity of the finished toolkit.

RELs and their partners need to plan creatively and strategically when designing the toolkit evaluation; in particular when examining the efficacy of the toolkit. For example, evaluations may not be able to use state assessments as an outcome measure because the assessment timeframe may not align with teachers use of the toolkit or may not be available in time for RELs to analyze the data to include in a report. Instead, RELs may consider relying on another type of assessment that will provide the necessary data in a timely fashion. RELs may consider all manner of evaluation methods and approaches (e.g., rapid cycle evaluations, traditional RCTs, interrupted time series, Bayesian analyses) as long as the REL sufficiently justifies the methods they propose to use.

RELs shall follow the review process guidelines for applied research proposals and reports described in Subtask 5.1 when designing and executing the evaluation of the toolkit. The toolkit evaluation proposal shall be submitted to IES as part of the REL competition proposal. After award, successful offerors will revise their proposals based on updated information about the proposed toolkit and the evaluation. Like all 5.1 research proposals and reports, the toolkit evaluation proposal and report will be reviewed by the COR, peer reviewed by RPR, and approved by the NCEE Associate Commissioner and NCEE Commissioner.

Both the toolkit, including usability testing, and evaluation of the toolkit must be completed within the five-year contract period. For that reason, the intended outcomes of the toolkit must include outcomes that the REL and its partners would expect to occur if the toolkit was

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implemented in a short time frame. The toolkit must be developed on a timeline that would allow for the draft evaluation report to be submitted to IES no later than September 2025.

As with all applied research reports under Subtask 5.1, the applied research report shall discuss the results of the evaluation of the toolkit with an informed lay audience in mind; in this case teachers, administrators, and parents. The final report should also indicate ways that the toolkit could be improved to be more usable or effective.

### **Subtask 5.3 Design and test new programs or practices (“interventions”) to improve student outcomes (not required).**

When there are few or no effective interventions in a potentially high-leverage domain of work with partners, RELs are permitted, but not required to design new programs or practices to meet partner and stakeholder needs.<sup>41</sup> These interventions should be informed by extant evidence and applicable theory. Interventions must be “manualized” such that they can be readily replicated elsewhere with fidelity if shown to be efficacious.

Interventions must be co-developed with at least one state, district, institution, or building-level partner. Other partners may be included as well to inform the intervention’s design, to support the intervention’s implementation, or to conduct some or all of the required evaluation.

Any new intervention developed under this task requires two forms of evaluation.

- 1) First, RELs must evaluate the usability, if applicable, of the intervention (usability in this Subtask is the same as defined under Subtask 5.2).
- 2) Second, RELs must evaluate the efficacy and implementation fidelity of the intervention under Subtask 5.1 prior to the intervention’s release by IES. Such an evaluation should at a minimum examine relevant short-term outcomes on the individuals and/or systems an intervention is designed to affect. Said evaluation should also seek to identify ways in which the intervention might be improved to be more usable, efficient, or effective. To the extent feasible, individuals or schools involved in the design of the intervention should not be included in the implementation study or evaluation.

RELs shall follow the review process guidelines for applied research proposals and reports described in Subtask 5.1 when developing the intervention and designing and executing the efficacy and implementation evaluation of the intervention. As with all applied research reports under Subtask 5.1, the evaluation report shall discuss the results with an informed lay audience in mind.

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<sup>41</sup> RELs wanting to rigorously evaluate extant interventions should propose that work under Subtask 5.1.

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If a REL decides to develop an online tool, the content shall be developed by the REL but the programming for the tool shall be developed and maintained by the REL Website contractor, similar to any online tool developed in Subtask 5.2. The REL COR will facilitate conversations between the REL and the REL Website contractor to determine the scope, requirements, and timeline for each project under this task. The technical design of online tools should be as simple as possible to meet the intended goals.

All work under this Subtask must be completed within the five-year contract, including the review and publication of the intervention and study. For that reason, RELs must think carefully about: (1) the scope of the intervention design and evaluation work and resulting schedule, and (2) what can be learned from the design and testing of a new intervention irrespective of the results of its efficacy trial. The intervention must be developed on a timeline that allows the draft evaluation report to be submitted to IES no later than September 2025.

#### **Subtask 5.4 Develop tools to support research processes and research-based practices (not required).**

If the need exists, RELs may, but are not required to, develop analytic tools that will support partners' and stakeholders' capacities to engage in the research process or tools that help educators implement research-based practices. Examples of analytic tools might include a self-study guide, a tool to support the development of a survey instrument, or a how-to-guide for conducting an analysis.

As noted above, RELs may also develop tools to help educators use research-based practices. A tool of this type may consist of one or a combination of the following components of the toolkits that were discussed above in Subtask 5.2: diagnostic instrument(s) for assessing baseline practice; professional development resources; and instrument(s) for assessing on-going practice. For example, during the 2017 REL cycle, REL Southeast created *the [Guide and Checklist for a School Leader's Walkthrough During Literacy Instruction Grades 4-12](#)*, designed to help school leaders observe specific research-based practices during literacy instruction in grade 4–12 classrooms and students' independent use or application of those practices.

RELs may not develop a new tool if a similar one already exists. Tools should be developed in partnership with key stakeholders in service of addressing a specific, high leverage need. Tools developed under Subtask 5.4 do not have to be based on WWC Practice Guides, and do not require implementation or efficacy evaluations. Tool proposals and the actual product developed under Subtask 5.4 shall be follow the traditional review process for proposals and tools. (See Appendix E of the Instructions to Offerors.)

If a REL wishes to develop an online tool, the content shall be developed by the REL but the programming for the tool shall be developed and maintained by the REL Website contractor, similar to any online tool developed in Subtask 5.2. The REL COR will facilitate conversations between the REL and the REL Website contractor to determine the scope, requirements, and

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timeline for each project under this task. The technical design of online tools should be as simple as possible to meet the intended goals.

#### **Subtask 5.5 Conduct assessments of research study quality.**

At the request of state and local departments of education, the REL shall conduct reviews of research studies for quality using scientific standards (for example, WWC standards or SEA- or LEA-specific standards) to support agencies' implementation of evidence requirements in their Every Student Succeeds Act (ESSA) plans. These reviews shall assess existing studies related to a specific practice or intervention to help determine their tier of evidence as described by nonregulatory ESSA guidance.<sup>42</sup> If the partners decide to use the nonregulatory ESSA guidance or otherwise wish to incorporate WWC standards to review studies, the REL shall use only reviewers certified in the WWC Procedures and Standards version 4.1 (group design) for this task and conduct reviews using the most current WWC standards and materials, including the WWC Online Study Review Guide. Reviews for studies not already reviewed by the WWC that may potentially meet Tier 1 (Strong) or Tier 2 (Moderate) evidence requirements must be completed using the WWC's Online Study Review Guide and shall be peer reviewed by a WWC contractor.

The REL shall develop a proposal for COR review and approval that discusses the scope, purpose, search methodology, output, timeline and detailed budget, including labor hours. The REL shall prepare a summary memo that describes the study review procedures and results of the review; this memo will be reviewed and approved by the COR. The REL shall also brief requestors on the results and implications of this assessment. As with all meeting materials, any additional materials developed for this briefing shall also be reviewed and approved by the COR.

#### **Subtask 5.6 Conduct original applied research that involves students, parents, and other community members (not required).**

This subtask is for RELs to undertake applied research that involves a wider group of stakeholders than the typical REL research project. A REL may conduct a study under Subtask 5.6 when a REL and partners identify the need for an applied research study that will help address a high-leverage problem and the REL and the partners believe that the study would benefit from the on-going input of students, parents, or other community members. There is no requirement for the REL to do work under this Subtask during the contract period.

As with other research projects, projects under this subtask shall include a strong justification for the relevance and rigor of the proposed work. In addition, the work under this subtask shall also be designed to both inform policy decisions and help build knowledge towards future decisions by practitioners or policymakers related to education policy or practice.

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<sup>42</sup> <https://www2.ed.gov/policy/elsec/leg/essa/guidanceusesinvestment.pdf>



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The REL projects under this task shall involve students, parents, or other community members from very beginning. Students, parents or other community members shall be invited to help identify and refine the study questions and provide input on the study methods from the very beginning of the project. In addition, the study shall involve original collection of data from relevant students, parents, or other community members through such methods as a survey and/or interviews, focus groups and observations. The REL shall work with IES to obtain OMB approval for such data collection within the first two years of the contract. Typically, studies under this subtask involve mixed methods – both qualitative and quantitative data collection and analyses.

This subtask may be particularly appropriate for research that involves racial or socio-economic equity issues, but RELs can consider this Subtask for any work in which on-going involvement of students, parents and other community members is appropriate.

All the work of this Subtask shall be done as outlined under the following sections of Subtask 5.1:

- Develop Research Proposals
- Documentation for Applied Research Projects
- Reporting Applied Research Findings

#### *Task 5 Quality Assurance Procedures*

The REL shall establish a process for ensuring that the work of the REL is of the highest quality and that all published products will meet IES review standards for rigor, relevance, quality, clarity, and plain language.<sup>43</sup> The REL shall ensure that personnel with appropriate cultural understanding, content knowledge, and methodological expertise to conduct careful reviews of research proposals and products before submission to the COR. In addition, the REL shall ensure that:

- All proposals and products shall be reviewed by practitioners, as appropriate.
  - All products receive extensive editorial attention with an emphasis on plain language.
- IES expects that each REL shall have authors of REL products invest extensively in drafting and editing their own products so that the writing is very clear and is succinct as possible. IES also expects RELs to invest extensively in the editing of products by an in-house editor before each product is submitted to IES.

In addition to the internal quality assurance procedures listed above, the REL shall propose an external SME whose roles within the project will be to review and provide feedback on draft

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<sup>43</sup> For more information about writing about research in everyday language, see: <https://files.eric.ed.gov/fulltext/ED545224.pdf>



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proposals and end products, and act as an advisor to the project team on the design and content of applied research projects throughout the life of the project (except projects under Subtask 5.5). The SME must be external to the project. That is, a SME cannot work on the project (or set of closely related projects) for which they act as a SME in any other capacity.

The REL may propose SMEs on a project-by-project basis, or submit a running list of experts, along with their affiliations, backgrounds, areas of expertise and a resume or CV for pre-approval. The SME must have content and design/methodological expertise related to the Task 5 project. The REL may decide to identify two SMEs for a project if someone with both content and methodological expertise is not available to serve in this role. Regardless, RELs must propose experts and provide documentation of their substantive expertise relevant to the project for approval before submitting a proposal for an applied research project. The REL shall also submit a memo along with proposal and product submissions outlining 1) the experts' feedback on proposals and products; and 2) the REL's response to the experts' feedback.

### ***Task 5 Deliverables***

Table 5 provides a list of required deliverables for work conducted under Task 5, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

**Table 5: Deliverables under Task 5**

Subtask	Deliverables	Due Date
5.1	Conduct original, empirical research and develop products	
	Concept paper	As needed
	Proposal	As proposed
	Notice of IRB approval or exemption	As proposed
	Data Management Plan (if applicable to the study)	As proposed
	OMB clearance package (if applicable to the study)	As proposed
	Data sharing agreement or memorandum of understanding (optional)	As proposed
	Applied research written product <sup>44</sup>	As proposed
5.2	Develop a toolkit based on WWC Practice Guides to support educators use of evidence-based practices	
	Concept paper	As needed
	Proposal for toolkit	As proposed
	Toolkit	As proposed
	Summary of revisions to toolkit based on efficacy evaluation results	As needed
5.3	Design and test new programs, policies, or practices ("intervention") to improve student outcomes (not required)	
	Concept paper	As needed
	Proposal for intervention	As proposed

<sup>44</sup> "Written Product" in this case denotes both traditional research reports as well as alternate formats such as power point slide decks and infographics.

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	Periodic summary of development, usability testing, and modifications made to intervention	As proposed
	Intervention	As proposed
	Summary of revisions to intervention based on efficacy evaluation results	As needed
5.4	Develop tools to support research (not required)	
	Concept paper	As needed
	Proposal for tool	As proposed
	Tool	As proposed
5.5	Conduct assessment of research study quality for ESSA compliance.	
	Concept paper	As needed
	Proposal	As proposed
	Study review(s), peer reviewed by WWC contractor if reviewed using WWC standards	As proposed
	Summary memo and/or associated materials for partners/stakeholders	As proposed
5.6	Conduct original applied research that involves students, parents, and other community members (not required)	
	Concept paper	As needed
	Proposal	As proposed
	Notice of IRB approval or exemption	As proposed
	Data Management Plan (if applicable to the study)	As proposed
	OMB clearance package (if applicable to the study)	As proposed
	Data sharing agreement or memorandum of understanding (optional)	As proposed
	Applied research written product <sup>45</sup>	As proposed

<sup>45</sup> “Written Product” in this case denotes both traditional research reports as well as alternate formats such as power point slide decks and infographics.

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## **Task 6: Dissemination**

The purpose of the Dissemination task is to enable education stakeholders to learn about and identify ways to apply the most up-to-date research in education to high leverage issues of policy and practice. Therefore, work under this task includes disseminating the results of REL work as well as the results of peer-reviewed research not conducted by the REL.

RELs shall craft dissemination strategies for their products based on their partners' needs and intended outcomes. The REL shall work with their partners to target their work to the specific audiences of interest, particularly those best positioned to help partnerships realize their intended outcomes. RELs shall also work with their partners to share dissemination products in the places or through the networks which these audiences are most likely to seek or receive information.

The REL shall disseminate the work in a way so that policymakers and educators can leverage it and apply it to their context. This involves crafting tailored messages and communication strategies to reach specific audiences. Products developed under this Task should be designed to provide engaging experiences that draw in new audiences and engage existing audiences. RELs are also expected to leverage the work of other RELs and Department grantees and contractors to help policymakers and educators benefit from the evidence and practices supported through the federal investment in education research and evaluation. All products developed under this Task will be reviewed and approved by the COR. For Subtasks that require an approved concept paper or proposal (that is, Subtasks 6.2, 6.3, and 6.7), concept papers and proposals shall include shall also include the proposed labor hours and costs for the project.<sup>46</sup>

### ***Subtask 6.1 Develop website content***

The REL shall be responsible for updating information on their webpages using template forms developed by the external Website contractor. The Website contractor is responsible for the design and structure of the website and RELs are responsible for providing timely and accurate website content in the format specified by the website contractor. RELs are also responsible for ensuring that all updates posted by the REL Website contractor are complete and accurate.

Within four weeks of contract award, the REL is responsible for providing information through an initial set of website forms and submitting them to IES. The REL is expected to submit content as it is developed or conducted such as new blog posts, newsletters, videos, event and TCTS materials, and Applied Research and Peer Reviewed Research-based products once they are approved by IES.

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<sup>46</sup> Additional guidance on the content of concept papers and proposals under these Subtasks will be provided post-award. Proposals under these Subtasks will typically require less information and effort than proposals under Tasks 4 and 5 given the smaller scopes of Task 6 projects.

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***Subtask 6.2 Develop engaging dissemination materials based on scientifically valid research and evidence-based practices***

The REL is responsible for creating supporting materials that present its work in succinct, visually engaging formats. Examples of supporting materials include, but are not limited to, short videos, infographics, fact sheets, or handouts.

IES expects that many Task 4 and all Task 5 projects will have supporting Dissemination activities or products. Such products shall be developed under this Subtask.<sup>47</sup> Dissemination materials based on Task 4 or Task 5 projects should be proposed in the concept paper and proposal for the Task 4 or Task 5 project. An updated proposal may be submitted, if necessary, with refined ideas for the materials after the Task 4 and Task 5 projects are underway. RELs will be required to submit a concept paper to the COR to propose developing dissemination materials under this Subtask that are not based on an existing Task 4 or Task 5 project.

RELs may also disseminate the findings from publicly available research that may be relevant and useful to a wide audience within their region. Whenever possible, the REL shall prioritize IES-funded work that is peer-reviewed and freely available. This includes the work of the WWC, evaluations from the National Center for Education Evaluation and Regional Assistance, and work produced by grantees from the NCER and NCSER. RELs may choose to connect multiple pieces of research or focus on a single study and shall ensure the findings of the research are understandable and applicable to their partners and other audiences. Products that connect multiple pieces of research will require review by a SME.<sup>48</sup> RELs may disseminate research findings through videos, infographics, or other methods.

The REL is required to make all materials developed under this task [508 compliant](#). These products will be posted on the REL website by the external website contractor.

***Subtask 6.3 Host events and develop conference presentations to disseminate research.***

RELs are encouraged to present their work widely through events and conference presentations. Events can be designed to be virtual or in person. RELs are encouraged to collaborate with other federal technical assistance centers, such as the Comprehensive Centers on events and presentations whenever feasible. When RELs host a webinar to disseminate their work, RELs shall develop three supporting products to be submitted to the COR within one month of the webinar:

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<sup>47</sup> Infographics, fact sheets, or any other products that are considered the final written product of applied research in lieu of a traditional research report under Task 5 should be developed under Subtask 5.1. Subtask 6.2 should only be used to develop supporting dissemination materials for Task 4 or 5 projects.

<sup>48</sup> See Task 4 for additional discussion on external subject matter experts (SMEs).

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- A 508 compliant video of the event, including a list of keywords and a description of the event. The event archive will be uploaded to the IES YouTube page.
- A 508 compliant one- to two-page summary of the webinar. This summary should include a brief background on the webinar topic, key research-based takeaways, and quotes from presenters.
- A 508 compliant document that lists audience questions during or after the event along with responses from the presenters.

RELs are encouraged to present at both local and national conferences and convenings of educators and policymakers who are well-situated to apply the lessons learned from REL work to policy or practice, furthering their partners' outcomes. This may include presentations to specific professional associations, membership organizations, state or district-level professional development trainings, and educator-focused conferences. While the REL may present its work at researcher-focused conferences, this should not be the REL's primary focus. Materials for events that connect multiple pieces of research may require review by a SME.

#### ***Subtask 6.4 Maintain a newsletter.***

The REL shall create a newsletter that includes general updates about the REL including announcements about publications or products that are released, and any upcoming events. Newsletters shall be produced at least four times a year but may be developed more frequently. RELs may also use their newsletter in an ad-hoc manner to announce events and publications. Newsletters may also be topic- or partnership-focused. RELs are encouraged to share blog posts in their newsletters as well. Each newsletter shall be archived on the REL website.

#### ***Subtask 6.5 Maintain a blog (not required).***

RELs may, but is not required to contribute to the REL Program blog. The blog posts may be newsletter articles (see Subtask 6.4) or unique articles. All blog posts shall tell a short story that explains how the REL's work is helping to advance their partners' outcomes and address high leverage problems in the region, and may share products and resources developed by the REL. If a REL chooses to blog, the blog posts shall appear on a regular schedule and shall be produced at least 4 times a year.

#### ***Subtask 6.6 Maintain a social media presence.***

RELs are responsible for maintaining a consistent social media presence. Currently, the only approved social media network for RELs is Twitter; each of the 10 RELs currently maintain their own account. It is possible that additional social media networks will be approved in the future. The REL is responsible for maintaining their REL's existing Twitter account and posting at least two times per week.

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All social media posts must be approved by the COR in advance. RELs may submit periodic batches of posts for COR approval, submit posts to the COR on an ad hoc basis, or combine both strategies. As with all dissemination products, social media posts and follows should be strategic and use easy to understand, clear language.

***Subtask 6.7 Develop supporting communications and branding materials.***

The REL shall create communications materials that inform policymakers and educators about the existence and purpose of the REL. Under this task the REL may create a brochure or handouts that explain the work of the REL. RELs also may create videos that explain how the REL operates or feature interviews with partners. This should represent a small fraction of the REL's dissemination work, as IES expects that these products will be developed in Year 1 or Year 2 of the five-year REL contract. The REL is expected to develop a proposal for the development of products under this Subtask with their COR as early as possible in the contract period to ensure that work is not duplicated across REL regions.

**Task 6 Deliverables**

Table 6 provides a list of required deliverables for work conducted under Task 6, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

**Table 6: Deliverables under Task 6**

Subtask	Deliverables	Due Date
6.1	Develop website content	
	Complete initial website templates	4 weeks after contract award
	Quarterly website updates	As proposed
	Website content templates	2 weeks after the event or product is released and as proposed for blogs and newsletters
6.2	Develop visually engaging dissemination materials based on scientifically valid research and evidence-based practices	
	Concept Paper	As needed
	Video Storyboard and script	As proposed
	Video	As proposed
	Draft handout, infographic or fact sheet	As proposed
	Final handout, infographic and fact sheet	As proposed
6.3	Host events and conference presentations	
	Proposal for event or required proposal for conference presentation	As needed
	Agenda and materials	2 weeks before the event
	Stakeholder Feedback Survey	2 weeks after the event
	Webinar video, keywords and description for YouTube page	4 weeks after the event
	Webinar summary	4 weeks after the event
	Webinar questions and answers document	4 weeks after the event

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6.4	Maintain a newsletter	
	Newsletter	At least quarterly; 4 weeks before scheduled release
6.5	Maintain a blog (not required)	
	Blog	As proposed; at least 4 weeks before scheduled release
6.6	Maintain a social media presence.	
	Social media posts	As proposed
6.7	Develop supporting communications and branding materials.	
	Proposal	As proposed
	Video storyboard and script	As proposed
	Video	As proposed
	Brochure or Handouts	
	Brochure or handout	As proposed

**Appendix A: The regional configuration for RELs**

Regional Educational Laboratory	States and Jurisdictions Included in Region
Appalachia	Kentucky, Tennessee, Virginia, West Virginia
Central	Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, Wyoming
Mid-Atlantic	Delaware, Maryland, New Jersey, Pennsylvania, Washington DC
Midwest	Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin
Northeast and Islands	Connecticut, Maine, Massachusetts, New Hampshire, New York, Puerto Rico, Rhode Island, Vermont, the U.S. Virgin Islands
Northwest	Alaska, Idaho, Montana, Oregon, Washington
Pacific	American Samoa, the Commonwealth of the Northern Mariana Islands, the Federated States of Micronesia (Chuuk, Kosrae, Pohnpei, and Yap), Guam, Hawaii, the Republic of the Marshall Islands, the Republic of Palau
Southeast	Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina
Southwest	Arkansas, Louisiana, New Mexico, Oklahoma, Texas
West	Arizona, California, Nevada, and Utah



## **Appendix B: Managing Controlled Unclassified Information (CUI) Requirements**

### **Applicability**

The contractor shall be responsible for handling sensitive and/or Controlled Unclassified Information (CUI) that is collected, stored, transmitted, or destroyed for the purposes of this contract in accordance with any applicable laws, regulations and government wide Policies (LRGWP) to include EO 13556, 32 CFR 2002 Part 2, The Department of Education Directive and NIST-800-171B when approved. These requirements apply to the Contractor, its subcontractors and teaming partners, and employees (hereafter referred to collectively as “Contractor”). These requirements are applicable to all Department information and data, regardless of medium, maintained by the Contractor for the performance of this contract.

### **Authorization to Handle CUI**

No person may have access to CUI unless that person has a valid need for such access in connection with the accomplishment of a lawful and authorized US Government mission. The Authorized holder is an individual, agency, organization, or group of users that is permitted to designate or handle CUI, in accordance with 32 CFR Part 2002. The authorized holder who designates the CUI must make recipients aware of the information’s CUI status in accordance with 32 CFR Part 2002.

### **Safeguarding**

The contractor shall be responsible for safeguarding any CUI that is collected for the purposes of this contract. The Contractor shall ensure that the appropriate personnel, administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, audio, video, documentary material, records and/or equipment is properly protected. The Contractor shall abide by and follow all LRGWP as it pertains to safeguarding of CUI. All electronically stored CUI shall be encrypted at rest and in motion as defined in the SOW. Contractors must take reasonable precautions to guard against unauthorized disclosure of CUI. Contractors must include the following measures among the reasonable precautions:

- Establish controlled environments in which to protect CUI from unauthorized access or disclosure and make use of those controlled environments;
- Reasonably ensure that unauthorized individuals cannot access or observe CUI, or overhear conversations discussing CUI;
- Keep CUI under the authorized holder's direct control or protect it with at least one physical barrier, and reasonably ensure that the authorized holder or the physical barrier protects the CUI from unauthorized access or observation when outside a controlled environment; and

- Protect the confidentiality of CUI that the Department or authorized holders process, store, or transmit on Federal information systems in accordance with the applicable security requirements and controls established in FIPS PUB 199, FIPS PUB 200, and NIST SP 800-53, (incorporated by reference, see § 2002.2), and paragraph (g) of Section 2002.14
- All Contractors must safeguard CUI using one of the following types of standards:
  - CUI Basic is the default set of standards authorized holders must apply to all CUI.
  - CUI Specified must be safeguarded in accordance with the requirements indicated in the NARA CUI Registry for the designated CUI Category.
- Safeguarding Information systems that process, store, or transmit CUI Basic, in accordance with FIPS PUB 199 (incorporated by reference, see § 2002.2), is categorized at no less than the moderate confidentiality impact level.
- Contractors must also apply the appropriate security requirements and controls from FIPS PUB 200 and NIST SP 800-53 to CUI in accordance with any risk-based tailoring decisions.

#### Physical Environments

CUI must be stored or handled in controlled environments that prevent or detect unauthorized access. Controlled environment and office spaces should include storing CUI in sealed envelopes, providing electronic locks and cabinets, locked doors, overhead bins and drawers.

#### Protecting Physical Equipment/Media that contains CUI

All electronic devices, storage media – i.e. video, audio, photographic images must be protected in accordance to the regulations defined in the NARA CUI Registry and mandatory CUI

#### Training.

#### Protecting CUI when shipping or mailing.

When sending CUI, authorized holders:

- May use the United States Postal Service or any commercial delivery service when they need to transport or deliver CUI to another entity;
- Should use in-transit automated tracking and accountability tools when they send CUI;
- May use interoffice or interagency mail systems to transport CUI; and
- Must mark packages that contain CUI according to marking requirements contained in this part and in guidance published by the CUI EA. See § 2002.20 for more guidance on marking requirements.

#### Reproducing CUI

When reproducing CUI documents on equipment such as printers, copiers, scanners, or fax machines, ensure that the equipment does not retain data or the agency must otherwise sanitize it in accordance with NIST SP 800-53 (incorporated by reference, see § 2002.2).

#### Transporting

The Contractor shall not remove material from Government facilities or systems, or facilities or systems operated or maintained on the Government's behalf, without the express written permission of the Head of the Contracting Activity. When traveling, contractors should ideally store material and equipment containing CUI in a locked vehicle, or in the trunk of a vehicle (weather conditions permitting) and out of plain sight.

#### Decontrolling

No contractor may decontrol CUI without approval by the CO/COR through the designated owner. Once the approval has been granted, the contractor may remove CUI markings. Decontrolling does not mean that the information can be released to the public.

#### Destroying and Deleting CUI

When destroying and deleting CUI, including in electronic form, contractors must do so in a manner that makes it unreadable, indecipherable, and irrecoverable. Contractor must comply with the process - Return of data section documented in this SOW.

#### Marking

All CUI documents must be protected according to LRGWP as defined in 32 CFR 2002, Part 2, ED Directive and NIST 800-171B (when published). The Contractor will adhere to the procedures for marking CUI as outlined in the NARA CUI Registry. Authorized holders of CUI will be held accountable for knowing and following the marking procedures as defined in the NARA CUI Registry.

#### Training

The Contractor shall ensure that initial mandatory Handling Sensitive Information training is completed before handling sensitive and CUI. The contractor will complete Functional CUI Training when appropriate and complete annual thereafter. The Contractor shall not allow any employee access to a system of records, or permit any employee to create, collect, use, process, store, maintain, disseminate, disclose, dispose or otherwise handle CUI, or to design, develop, maintain, or operate a system of records unless the employee has completed training, as required by this clause. The Contractor shall maintain and, upon request, provide documentation of completion of privacy training to the Contracting Officer.

#### Retention of Authorizing Documentation

The Contractor must maintain a current and complete file of all documentation authorizing handling of CUI during the period of performance of the contract, unless otherwise instructed by the Contracting Officer. Documentation will be made accessible during inspections or upon written request by the CO or the COR.

#### Transmitting

Upon completion of the contract, all CUI information, data, documentary material, records and/or equipment shall be returned to Department control or the Contractor must hold it until otherwise directed.

#### Self-Inspection

Contractors will be required to perform an annual self-inspection to demonstrate compliance to the CUI program. Self-Inspection Program Requirements include:

- Evaluate adherence to the principles and requirements of the ED Directive (#)
- Safeguarding
- Security Violations
- Education and Training

#### Compliance with Information Protection Requirements

The Chief Information Officer (CIO) or the Office of Inspector General (OIG), through the CO or COR, reserves the right to verify compliance with information security requirements established by this contract. Verification may include, but is not limited to, onsite or offsite inspections, audits, documentation reviews, process observation, network and IT system scanning. The Contractor will fully comply with all Department-initiated inspections as permissible by law.

#### Information Security Incidents (ISI)

Contractors must immediately report any and all suspected security incidents, breaches, and events involving Department information to the Department's Computer Incident Response Center (EDCIRC) and the Department's Security Operations Center (EDSOC); EDCIRC@ED.GOV; EDSOC voice: 202-243-6550. The EDSOC is available 24 hours per day, 365 days per year. Contractors must report any and all ISI involving information technology (IT) systems and CUI immediately upon becoming aware of the ISI but no later than 60 minutes after becoming aware of the ISI, regardless of day or time; regardless of internal investigation, evaluation, or confirmation of procedures or activities; and regardless of whether the ISI is suspected, known, or determined to involve IT systems operated in support of this contract.

Misuse of CUI / Incident Response and Access to Contractor Information Technology (IT) Systems

During the period of performance of the contract and throughout any contract close-out period, the Contractor must provide the Department, or its designate, with immediate access to all IT systems used by the Contractor to support the performance of the contract for the purpose of inspection and forensic analysis in the event of an ISI. The Contractor shall immediately notify the appropriate CO upon discovery of any inadvertent or unauthorized disclosures of information, data, documentary materials, records or equipment that is CUI. Disclosure of CUI is limited to authorized personnel with a lawful need-to-know.

## Appendix C: IT Accessibility Requirements

Section 508 of the Rehabilitation Act, as amended by the Workforce Investment Act of 1998 (P.L. 105-220) requires that when Federal agencies develop, procure, maintain, or use information and communication technology (ICT), it shall be accessible to people with disabilities. Federal employees and members of the public who have disabilities must have access to, and use of, information and data that is comparable to people without disabilities. Products, platforms and services delivered as part of this work statement that are ICT, or contain ICT, must conform to the Revised 508 Standards, which are located at 36 C.F.R. § 1194.1 & Apps. A, C & D, and available at <https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/final-rule/text-of-the-standards-and-guidelines>.

**Applicable Functional Performance Criteria:** All functional performance criteria apply when using an alternative design or technology that achieves substantially equivalent or greater accessibility and usability by individuals with disabilities, than would be provided by conformance to one or more of the requirements in Chapters 4-6 of the Revised 508 Standards, or when Chapters 4-6 do not address one or more functions of ICT.

**Applicable requirements for software features and components:** All WCAG Level AA Success Criteria, 502 Interoperability with Assistive Technology, 503 Application Applicable requirements for hardware features and components: All requirements apply Applicable support services and documentation: All requirements apply.

**Instructions:** 1. Provide an Accessibility Conformance Report (ACR) for each commercially available Information and Communication Technology (ICT) item offered through this contract. Create the ACR using the Voluntary Product Accessibility Template Version 2.1 or later, located at <https://www.itac.org/policy/accessibility/vpat>. Complete each ACR in accordance with the instructions provided in the VPAT template. Each ACR must address the applicable Section 508 requirements referenced in the Work Statement. Each ACR shall state exactly how the ICT meets the applicable standards in the remarks/explanations column, or through additional narrative. All "Not Applicable" (N/A) responses must be explained in the remarks/explanations column or through additional narrative. Address each standard individually and with specificity, and clarify whether conformance is achieved throughout the entire ICT Item (for example - user functionality, administrator functionality, and reporting), or only in limited areas of the ICT Item. Provide a description of the evaluation methods used to support Section 508 conformance claims. The agency reserves the right, prior to making an award decision, to perform testing on some or all of the Offeror's proposed ICT items to validate Section 508 conformance claims made in the ACR. 2. Describe your approach to incorporating universal design principles to ensure ICT products or services are designed to support disabled users. 3. Describe plans for features that do not fully conform to the Section 508 Standards. 4. Describe "typical" user scenarios and tasks, including individuals with disabilities, to ensure fair and accurate accessibility testing of the ICT product or service being offered. **Instructions:** Insert the following language into the Acceptance Criteria section of the solicitation.

Acceptance Criteria: Prior to acceptance, the government reserves the right to perform testing on required ICT items to validate the offeror's Section 508 conformance claims. If the government determines that Section 508 conformance claims provided by the offeror represent a higher level of conformance than what is actually provided to the agency, the government shall, at its option, require the offeror to remediate the item to align with the offeror's original Section 508 conformance claims prior to acceptance.

ICT Accessibility Requirements Statement per the Revised Section 508 of the Rehabilitation Act  
Data Services or Information Retrieval Systems Electronic Content

Technical Criteria: E205.1 General -

- Electronic content shall comply with E205.
- E205.2 Public Facing -
- Electronic content that is public facing shall conform to the accessibility requirements specified in E205.4.
- 602 Support Documentation -
- 603 Support Services -
- 302 Functional Performance Criteria -
- Software

Technical Criteria: E207.1 General -

- Where components of ICT are software and transmit information or have a user interface, such components shall conform to E207 and the requirements in Chapter 5
- E207.2 WCAG Conformance -
- User interface components, as well as the content of platforms and applications, shall conform to Level A and Level AA Success Criteria and Conformance Requirements in WCAG 2.0 (incorporated by reference, see 702.10.1).

E207.2.1 Word Substitution -

- When Applying WCAG to Non-Web Software For non-Web software, wherever the term "Web page" or "page" appears in WCAG 2.0 Level A and AA Success Criteria and Conformance Requirements, the term "software" shall be substituted for the terms "Web page" and "page". In addition, in Success Criterion in 1.4.2, the phrase "in software" shall be substituted for the phrase "on a Web page."

E207.3 Complete Process for Non-Web Software: Where non-Web software requires multiple steps to accomplish an activity, all software related to the activity to be accomplished shall conform to WCAG 2.0 as specified in E207.2.

Exceptions: E501.1 Scope: Where Web applications do not have access to platform accessibility services and do not include components that have access to platform accessibility services, they shall not be required to conform to 502 or 503 provided that they conform to Level A and Level AA Success Criteria and Conformance Requirements in WCAG 2.0 (incorporated by reference, see 702.10.1).

Functional Performance Criteria:

- 301.1 Scope - The requirements of Chapter 3 shall apply to ICT where required by 508 Chapter 2 (Scoping Requirements), 255 Chapter 2 (Scoping Requirements), and where otherwise referenced in any other chapter of the Revised 508 Standards or Revised 255 Guidelines.
- 302.1 Without Vision - Where a visual mode of operation is provided, ICT shall provide at least one mode of operation that does not require user vision.
- 302.2 With Limited Vision - Where a visual mode of operation is provided, ICT shall provide at least one mode of operation that enables users to make use of limited vision.
- 302.3 Without Perception of Color - Where a visual mode of operation is provided, ICT shall provide at least one visual mode of operation that does not require user perception of color.
- 302.4 Without Hearing - Where an audible mode of operation is provided, ICT shall provide at least one mode of operation that does not require user hearing.
- 302.5 With Limited Hearing - Where an audible mode of operation is provided, ICT shall provide at least one mode of operation that enables users to make use of limited hearing.
- 302.6 Without Speech - Where speech is used for input, control, or operation, ICT shall provide at least one mode of operation that does not require user speech.
- 302.7 With Limited Manipulation - Where a manual mode of operation is provided, ICT shall provide at least one mode of operation that does not require fine motor control or simultaneous manual operations.
- 302.8 With Limited Reach and Strength - Where a manual mode of operation is provided, ICT shall provide at least one mode of operation that is operable with limited reach and limited strength.



- 302.9 With Limited Language, Cognitive, and Learning Abilities - ICT shall provide features making its use by individuals with limited cognitive, language, and learning abilities simpler and easier. END

## **Appendix D: Records Management Obligations**

### **A. Applicability**

This clause applies to all Contractors whose employees create, work with, or otherwise handle Federal records, as defined in Section B, regardless of the medium in which the record exists.

### **B. Definitions**

"Federal record" as defined in 44 U.S.C. § 3301, includes all recorded information, regardless of form or characteristics, made or received by a Federal agency under Federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the United States Government or because of the informational value of data in them.

The term Federal record: includes IES records; does not include personal materials; applies to records created, received, or maintained by Contractors pursuant to their IES contract; may include deliverables and documentation associated with deliverables.

### **C. Requirements**

Contractor shall comply with all applicable records management laws and regulations, as well as National Archives and Records Administration (NARA) records policies, including but not limited to the Federal Records Act (44 U.S.C. chs. 21, 29, 31, 33), NARA regulations at 36 CFR Chapter XII Subchapter B, and those policies associated with the safeguarding of records covered by the Privacy Act of 1974 (5 U.S.C. 552a). These policies include the preservation of all records, regardless of form or characteristics, mode of transmission, or state of completion.

In accordance with 36 CFR 1222.32, all data created for Government use and delivered to, or falling under the legal control of, the Government are Federal records subject to the provisions of 44 U.S.C. chapters 21, 29, 31, and 33, the Freedom of Information Act (FOIA) (5 U.S.C. 552), as amended, and the Privacy Act of 1974 (5 U.S.C. 552a), as amended and must be managed and scheduled for disposition only as permitted by statute or regulation.

In accordance with 36 CFR 1222.32, Contractor shall maintain all records created for Government use or created in the course of performing the contract and/or delivered to, or under the legal control of the Government and must be managed in accordance with Federal law. Electronic records and associated metadata must be accompanied by sufficient technical documentation to permit understanding and use of the records and data, which should address at minimum the following according to 36 CFR 1236.10:

The following types of records management controls are needed to ensure that Federal records in electronic information systems can provide adequate and proper documentation of agency business for as long as the information is needed. Agencies must incorporate controls into the electronic information system or integrate them into a recordkeeping system that is external to the information system itself (see § 1236.20 of this part).

(a) Reliability: Controls to ensure a full and accurate representation of the transactions, activities or facts to which they attest and can be depended upon in the course of subsequent transactions or activities.

(b) Authenticity: Controls to protect against unauthorized addition, deletion, alteration, use, and concealment.

(c) Integrity: Controls, such as audit trails, to ensure records are complete and unaltered.

(d) Usability: Mechanisms to ensure records can be located, retrieved, presented, and interpreted.

(e) Content: Mechanisms to preserve the information contained within the record itself that was produced by the creator of the record;

(f) Context: Mechanisms to implement cross-references to related records that show the organizational, functional, and operational circumstances about the record, which will vary depending upon the business, legal, and regulatory requirements of the business activity; and

(g) Structure: controls to ensure the maintenance of the physical and logical format of the records and the relationships between the data elements.

The Department and its contractors are responsible for preventing the alienation or unauthorized destruction of records, including all forms of mutilation. Records may not be removed from the legal custody of IES or destroyed except for in accordance with the provisions of the agency records schedules and with the written concurrence of the Head of the Contracting Activity. Willful and unlawful destruction, damage or alienation of Federal records is subject to the fines and penalties imposed by 18 U.S.C. 2701. In the event of any unlawful or accidental removal, defacing, alteration, or destruction of records, Contractor must report to IES. The agency must report promptly to NARA in accordance with 36 CFR 1230.

The Contractor shall immediately notify the appropriate Contracting Officer upon discovery of any inadvertent or unauthorized disclosures of information, data, documentary materials, records or equipment. Disclosure of non-public information is limited to authorized personnel with a need-to-know as described in the contract. The Contractor shall ensure that the appropriate personnel, administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, documentary material, records and/or equipment is properly protected. The Contractor shall not remove material from Government facilities or systems, or facilities or systems operated or maintained on the Government's behalf, without the express written permission of the Head of the Contracting Activity. When information, data, documentary material, records and/or equipment is no longer required, it shall be returned to IES control or the Contractor must hold it until otherwise directed. Items returned to the Government shall be hand-carried, mailed, emailed, or securely electronically transmitted to the Contracting Officer or address prescribed in the contract. Destruction of records is EXPRESSLY PROHIBITED unless in accordance with Paragraph (4).

The Contractor is required to obtain the Contracting Officer's approval prior to engaging in any contractual relationship (sub-contractor) in support of this contract requiring the disclosure of information, documentary material and/or records generated under, or relating to, contracts. The Contractor (and any sub-contractor) is required to abide by Government and IES guidance for protecting sensitive, proprietary information, classified, and controlled unclassified information.

The Contractor shall only use Government IT equipment for purposes specifically tied to or authorized by the contract and in accordance with IES policy.

The Contractor shall not create or maintain any records containing any non-public IES information that are not specifically tied to or authorized by the contract.

The Contractor shall not retain, use, sell, or disseminate copies of any deliverable that contains

information covered by the Privacy Act of 1974 or that which is generally protected from public disclosure by an exemption to the Freedom of Information Act.

IES owns the rights to all data and records produced as part of this contract. All deliverables under the contract are the property of the U.S. Government for which IES shall have unlimited rights to use, dispose of, or disclose such data contained therein as it determines to be in the public interest. Any Contractor rights in the data or deliverables must be identified as required by FAR 52.227-11 through FAR 52.227-20.

Training. All Contractor employees assigned to this contract who create, work with or otherwise handle records are required to take IES-provided records management training. The Contractor is responsible for confirming training has been completed according to agency policies, including initial training and any annual or refresher training.

[Note: To the extent an agency requires contractors to complete records management training, the agency must provide the training to the contractor.]

#### D. Flowdown of requirements to subcontractors

The Contractor shall incorporate the substance of this clause, its terms, and requirements including this paragraph, in all subcontracts under this contract and require written subcontractor acknowledgment of same.

Violation by a subcontractor of any provision set forth in this clause will be attributed to the Contractor.

## J.3 Deliverable Schedule

## APPENDIX IV. DELIVERABLES SCHEDULE

SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name	Draft Date Due	Final Date Due		
1	.	1	.		Summary of REL Kickoff Meeting				
1	.	1	.	1	Summary of REL Kickoff Meeting	1/31/22	2/21/22		
1	.	2	.	1	Bimonthly call agendas				
1	.	2	.	1	Year 1 January Call 1	1/11/22	1/12/22		
1	.	2	.	1	Year 1 January Call 2	1/25/22	1/26/22		
1	.	2	.	1	Year 1 February Call 1	2/8/22	2/9/22		
1	.	2	.	1	Year 1 February Call 2	2/22/22	2/23/22		
1	.	2	.	1	Year 1 March Call 1	3/8/22	3/9/22		
1	.	2	.	1	Year 1 March Call 2	3/22/22	3/23/22		
1	.	2	.	1	Year 1 April Call 1	4/5/22	4/6/22		
1	.	2	.	1	Year 1 April Call 2	4/19/22	4/20/22		
1	.	2	.	1	Year 1 May Call 1	5/3/22	5/4/22		
1	.	2	.	1	Year 1 May Call 2	5/17/22	5/18/22		
1	.	2	.	1	Year 1 June Call 1	6/7/22	6/8/22		
1	.	2	.	1	Year 1 June Call 2	6/21/22	6/22/22		
1	.	2	.	1	Year 1 July Call 1	7/5/22	7/6/22		
1	.	2	.	1	Year 1 July Call 2	7/19/22	7/20/22		
1	.	2	.	1	Year 1 August Call 1	8/2/22	8/3/22		
1	.	2	.	1	Year 1 August Call 2	8/16/22	8/17/22		
1	.	2	.	1	Year 1 September Call 1	9/6/22	9/7/22		
1	.	2	.	1	Year 1 September Call 2	9/20/22	9/21/22		
1	.	2	.	1	Year 1 October Call 1	10/4/22	10/5/22		
1	.	2	.	1	Year 1 October Call 2	10/18/22	10/19/22		

SCHEDULE OF DELIVERABLES						
Deliverable #			Deliverable Name	Draft Date Due	Final Date Due	
1 . 2 . 1 . 21			Year 1 November Call 1	11/1/22	11/2/22	
1 . 2 . 1 . 22			Year 1 November Call 2	11/15/22	11/16/22	
1 . 2 . 1 . 23			Year 1 December Call 1	11/29/22	11/30/22	
1 . 2 . 1 . 24			Year 1 December Call 2	12/13/22	12/14/22	
1 . 2 . 1 . 25			Year 2 January Call 1	1/10/23	1/11/23	
1 . 2 . 1 . 26			Year 2 January Call 2	1/24/23	1/25/23	
1 . 2 . 1 . 27			Year 2 February Call 1	2/7/23	2/8/23	
1 . 2 . 1 . 28			Year 2 February Call 2	2/21/23	2/22/23	
1 . 2 . 1 . 29			Year 2 March Call 1	3/7/23	3/8/23	
1 . 2 . 1 . 30			Year 2 March Call 2	3/21/23	3/22/23	
1 . 2 . 1 . 31			Year 2 April Call 1	4/4/23	4/5/23	
1 . 2 . 1 . 32			Year 2 April Call 2	4/18/23	4/19/23	
1 . 2 . 1 . 33			Year 2 May Call 1	5/2/23	5/3/23	
1 . 2 . 1 . 34			Year 2 May Call 2	5/16/23	5/17/23	
1 . 2 . 1 . 35			Year 2 June Call 1	6/6/23	6/7/23	
1 . 2 . 1 . 36			Year 2 June Call 2	6/20/23	6/21/23	
1 . 2 . 2 .			Bimonthly call memos			
1 . 2 . 2 . 1			Year 1 January Call 1	1/18/22	2/8/22	
1 . 2 . 2 . 2			Year 1 January Call 2	2/1/22	2/22/22	
1 . 2 . 2 . 3			Year 1 February Call 1	2/15/22	3/8/22	
1 . 2 . 2 . 4			Year 1 February Call 2	3/1/22	3/22/22	
1 . 2 . 2 . 5			Year 1 March Call 1	3/15/22	4/5/22	
1 . 2 . 2 . 6			Year 1 March Call 2	3/29/22	4/19/22	
1 . 2 . 2 . 7			Year 1 April Call 1	4/12/22	5/3/22	
1 . 2 . 2 . 8			Year 1 April Call 2	4/26/22	5/17/22	

SCHEDULE OF DELIVERABLES						
Deliverable #			Deliverable Name	Draft Date Due	Final Date Due	
1 . 2 . 2 . 9			Year 1 May Call 1	5/10/22	5/31/22	
1 . 2 . 2 . 10			Year 1 May Call 2	5/24/22	6/14/22	
1 . 2 . 2 . 11			Year 1 June Call 1	6/14/22	7/5/22	
1 . 2 . 2 . 12			Year 1 June Call 2	6/28/22	7/19/22	
1 . 2 . 2 . 13			Year 1 July Call 1	7/12/22	8/2/22	
1 . 2 . 2 . 14			Year 1 July Call 2	7/26/22	8/16/22	
1 . 2 . 2 . 15			Year 1 August Call 1	8/9/22	8/30/22	
1 . 2 . 2 . 16			Year 1 August Call 2	8/23/22	9/13/22	
1 . 2 . 2 . 17			Year 1 September Call 1	9/13/22	10/4/22	
1 . 2 . 2 . 18			Year 1 September Call 2	9/27/22	10/18/22	
1 . 2 . 2 . 19			Year 1 October Call 1	10/11/22	11/11/22	
1 . 2 . 2 . 20			Year 1 October Call 2	10/25/22	11/15/22	
1 . 2 . 2 . 21			Year 1 November Call 1	11/8/22	11/29/22	
1 . 2 . 2 . 22			Year 1 November Call 2	11/22/22	12/13/22	
1 . 2 . 2 . 23			Year 1 December Call 1	12/6/22	12/27/22	
1 . 2 . 2 . 24			Year 1 December Call 2	12/20/22	1/10/23	
1 . 2 . 2 . 25			Year 2 January Call 1	1/17/23	2/7/23	
1 . 2 . 2 . 26			Year 2 January Call 2	1/31/23	2/21/23	
1 . 2 . 2 . 27			Year 2 February Call 1	2/14/23	3/7/23	
1 . 2 . 2 . 28			Year 2 February Call 2	2/28/23	3/21/23	
1 . 2 . 2 . 29			Year 2 March Call 1	3/14/23	4/4/23	
1 . 2 . 2 . 30			Year 2 March Call 2	3/28/23	4/18/23	
1 . 2 . 2 . 31			Year 2 April Call 1	4/11/23	5/2/23	
1 . 2 . 2 . 32			Year 2 April Call 2	4/25/23	5/16/23	
1 . 2 . 2 . 33			Year 2 May Call 1	5/9/23	5/30/23	

SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name	Draft Date Due	Final Date Due		
1	.	2	.	2	34	Year 2 May Call 2	5/23/23	6/13/23	
1	.	2	.	2	35	Year 2 June Call 1	6/13/23	7/5/23	
1	.	2	.	2	36	Year 2 June Call 2	6/27/23	7/18/23	
1	.	4	.	.	.	Department presentation briefing materials			
1	.	4	.	1	1	Department presentation briefing materials - Year 1 first meeting	3 weeks before each meeting		
1	.	4	.	1	2	Department presentation briefing materials - Year 1 second meeting	3 weeks before each meeting		
1	.	4	.	1	3	Department presentation briefing materials - Year 2 first meeting	3 weeks before each meeting		
1	.	4	.	1	4	Summary of department presentation - Year 1 first meeting	1 week after each meeting		
1	.	4	.	1	5	Summary of department presentation - Year 1 second meeting	1 week after each meeting		
1	.	4	.	1	6	Summary of department presentation - Year 2 first meeting	1 week after each meeting		
1	.	5	.	.	.	Identify, establish, maintain and convene the Governing Board			
1	.	5	.	1	1	Report of the Establishment of the Governing Board	5 weeks after award		
1	.	5	.	2	1	Agenda and materials for Governing Board meeting - Year 1 Spring Governing Board meeting	3 weeks before meeting		
1	.	5	.	3	1	Meeting minutes and action items - Year 1 Spring Governing Board meeting	2 weeks after meeting		
1	.	5	.	2	2	Agenda and materials for Governing Board meeting - Year 1 Fall Governing Board meeting	3 weeks before meeting		
1	.	5	.	3	2	Meeting minutes and action items - Year 1 Fall Governing Board meeting	2 weeks after meeting		



SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name		Draft Date Due	Final Date Due	
1	.	5		2	.	3	Agenda and materials for Governing Board meeting - Year 2 Spring Governing Board meeting	3 weeks before meeting	
1	.	5		3	.	3	Meeting minutes and action items - Year 2 Spring Governing Board meeting	2 weeks after meeting	
1	.	6					Bi-Annual Assessment of Progress Report		
1	.	6		1	.	1	Bi-Annual Assessment of Progress Report	12 weeks after effective date of UAP	
1	.	6		1	.	2	Bi-Annual Assessment of Progress Report	10/31/22	11/21/22
1	.	6		1	.	3	Bi-Annual Assessment of Progress Report	4/28/23	5/19/23
1	.	7					Monthly Progress Report		
1	.	7	.	1	.	1	Year 1 January	2/8/22	3/1/22
1	.	7	.	1	.	2	Year 1 February	3/8/22	3/29/22
1	.	7	.	1	.	3	Year 1 March	4/8/22	4/22/22
1	.	7	.	1	.	4	Year 1 April	5/9/22	5/30/22
1	.	7	.	1	.	5	Year 1 May	6/8/22	6/29/22
1	.	7	.	1	.	6	Year 1 June	7/11/22	8/1/22
1	.	7	.	1	.	7	Year 1 July	8/8/22	8/29/22
1	.	7	.	1	.	8	Year 1 August	9/9/22	9/30/22
1	.	7	.	1	.	9	Year 1 September	10/10/22	10/31/22
1	.	7	.	1	.	10	Year 1 October	11/8/22	12/1/22
1	.	7	.	1	.	11	Year 1 November	12/8/22	12/23/22
1	.	7	.	1	.	12	Year 1 December	1/9/23	1/30/23
1	.	7	.	1	.	13	Year 2 January	2/8/23	3/1/23
1	.	7	.	1	.	14	Year 2 February	3/8/23	3/29/23
1	.	7	.	1	.	15	Year 2 March	4/10/23	5/1/23
1	.	7	.	1	.	16	Year 2 April	5/8/23	5/29/23

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SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name	Draft Date Due	Final Date Due		
1	.	7	.	1	17	Year 2 May	6/8/23	6/29/23	
1	.	7	.	1	18	Year 2 June	7/11/23	8/1/23	
1	.	8	.			Performance reporting			
1	.	8	.	1	1	Performance report 1	Upon request		
1	.	8	.	1	2	Performance report 2	Upon request		
1	.	8	.	1	3	Performance report 3	Upon request		
1	.	8	.	1	4	Performance report 4	Upon request		
1	.	8	.	1	5	Performance report 5	Upon request		
1	.	8	.	1	6	Performance report 6	Upon request		
1	.	8	.	1	7	Performance report 7	Upon request		
1	.	9	.			Submission of security documents for low and moderate level clearances			
1	.	9	.	1	1	Submission of security documents for low and moderate level clearances	As needed		
1	.	10	.			REL evaluation materials			
1	.	10	.	1	1	REL evaluation materials	Within two weeks of the effective date of the contract, as needed		
2	.	1	.			Lead cross-REL coordination activities			
2	.	1	.	1	1	Cross-REL working group agenda - Year 1 Quarter 2	2 weeks before meeting		
2	.	1	.	2	1	Cross-REL working group memo - Year 1 Quarter 2	2 weeks after meeting		
2	.	1	.	1	2	Cross-REL working group agenda - Year 1 Quarter 3	2 weeks before meeting		

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SCHEDULE OF DELIVERABLES												
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due		
2	.	1	.	2	.	2		Cross-REL working group memo - Year 1 Quarter 3	2 weeks after meeting			
2	.	1	.	1	.	3		Cross-REL working group agenda - Year 1 Quarter 4	2 weeks before meeting			
2	.	1	.	2	.	3		Cross-REL working group memo - Year 1 Quarter 4	2 weeks after meeting			
2	.	1	.	1	.	4		Cross-REL working group agenda - Year 2 Quarter 1	2 weeks before meeting			
2	.	1	.	2	.	4		Cross-REL working group memo - Year 2 Quarter 1	2 weeks after meeting			
2	.	1	.	1	.	5		Cross-REL working group agenda - Year 2 Quarter 2	2 weeks before meeting			
2	.	1	.	2	.	5		Cross-REL working group memo - Year 2 Quarter 2	2 weeks after meeting			
2	.	1	.	3	.	6		Proposal for Cross-REL, REL-only event	As needed			
2	.	1	.	4	.	6		Agenda and materials for cross REL, REL-only event	3 weeks before event			
2	.	1	.	5	.	1		Summary of cross-REL, REL-only event	2 weeks after event			
2	.	1						Cross-REL infographic or newsletter				
2	.	1	.	6	.	1		Proposal	11/30/22	12/21/22		
2	.	1	.	7	.	1		Cross-REL Working Group Fact Sheet	1/31/23			
2	.	3						Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments				
2	.	3	.	1	.	1		Signed letter(s) of intent with each regional CC in REL Region	Within 90 days of the effective date of the contract			
2	.	3	.	2	.	1		Annual memo of needs sensing between REL and CCs	1/31/23	2/21/23		

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SCHEDULE OF DELIVERABLES										
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due
2	.	3	.	3	.	1		Joint needs sensing summary meeting minutes	3/30/23	4/20/23
2	.	3	.	2	.	2		Annual memo of needs sensing between REL and CCs	1/31/24	2/21/24
2	.	3	.	3	.	2		Joint needs sensing summary meeting minutes	3/29/24	4/19/24
3	.	1						Conduct needs-sensing and develop partnerships		
								Partnership Proposal--South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)		
3	.	1	.	1	.	1	1		As needed	
3	.	1	.	1	.	1	2	Partnership Proposal--Mississippi Adolescent Literacy (MSAL)	As needed	
3	.	1	.	1	.	1	3	Partnership Proposal--Alabama Research Partnership on Improving English Learner Outcomes (ALEL)	As needed	
3	.	1	.	1	.	1	4	Partnership Proposal--Florida K-3 Literacy (FLK3)	As needed	
								Partnership Proposal--Florida Virtual School Partnership (FLVS)	As needed	
3	.	1	.	1	.	1	5		As needed	
3	.	1	.	1	.	1	6	Partnership Proposal--School Climate and Literacy (SCAL4GA)	As needed	
								Partnership Proposal--Measuring Success through Competency-Based Learning (NCCEE)	As needed	
3	.	1	.	1	.	1	8	Partnership Proposal--Post-secondary success at Historically Black Colleges and Universities (TPHBCU)	As needed	
									As needed; 2 weeks before meeting	
3	.	1	.	2	.	*	*	Needs sensing meeting materials (Partnership TBD)		
									As needed; 2 weeks before meeting	
3	.	1	.	2	.	*	*	Needs sensing meeting materials (Partnership TBD)		

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SCHEDULE OF DELIVERABLES												
Deliverable #										Deliverable Name	Draft Date Due	Final Date Due
3	.	1	.	2	.	*	.	*	Needs sensing meeting materials (Partnership TBD)		As needed; 2 weeks before meeting	
3	.	1	.	2	.	*	.	*	Needs sensing meeting materials (Partnership TBD)		As needed; 2 weeks before meeting	
3	.	2	.	1	.		.		Maintain partnerships under subtask 3.1			
3	.	2	.	1	.	*	.	*	South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)			
3	.	2	.	1	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(SCPLC)		4/14/22	5/5/22
3	.	2	.	1	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(SCPLC)		4/28/22	5/19/22
3	.	2	.	1	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(SCPLC)		7/14/22	8/4/22
3	.	2	.	1	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(SCPLC)		7/28/22	8/11/22
3	.	2	.	1	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(SCPLC)		10/13/22	11/3/22
3	.	2	.	1	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(SCPLC)		10/27/22	11/17/22
3	.	2	.	1	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(SCPLC)		1/12/23	2/2/23
3	.	2	.	1	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(SCPLC)		1/26/23	2/16/23
3	.	2	.	1	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(SCPLC)		4/13/23	5/4/23
3	.	2	.	1	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(SCPLC)		4/27/23	5/18/23

SCHEDULE OF DELIVERABLES												
Deliverable #									Deliverable Name		Draft Date Due	Final Date Due
3	.	2	.	1	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(SCPLC)		7/13/23	8/3/23
3	.	2	.	1	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(SCPLC)		7/27/23	8/17/23
3	.	2	.	1	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(SCPLC)		11/30/22	12/21/23
3	.	2	.	2	.	*	.	*	Mississippi Adolescent Literacy (MSAL)			
3	.	2	.	2	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(MSAL)		4/14/22	5/5/22
3	.	2	.	2	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(MSAL)		4/28/22	5/19/22
3	.	2	.	2	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(MSAL)		7/14/22	8/4/22
3	.	2	.	2	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(MSAL)		7/28/22	8/18/22
3	.	2	.	2	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(MSAL)		10/13/22	11/3/22
3	.	2	.	2	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(MSAL)		10/27/22	11/17/22
3	.	2	.	2	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(MSAL)		1/12/23	2/2/23
3	.	2	.	2	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(MSAL)		1/26/23	2/16/23
3	.	2	.	2	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(MSAL)		4/13/23	5/4/23
3	.	2	.	2	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(MSAL)		4/27/23	5/18/23
3	.	2	.	2	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(MSAL)		7/13/23	8/3/23

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SCHEDULE OF DELIVERABLES												
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due	
3	.	2	.	2	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(MSAL)	7/27/23	8/17/23	
3	.	2	.	2	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(MSAL)	11/30/23	12/14/23	
3	.	2	.	3	.	*	.	*	Alabama Partnership on Improving English Learner Outcomes (ALEL)			
3	.	2	.	3	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(ALEL)	4/14/22	5/5/22	
3	.	2	.	3	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(ALEL)	4/28/22	5/19/22	
3	.	2	.	3	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(ALEL)	7/14/22	8/4/22	
3	.	2	.	3	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(ALEL)	7/28/22	8/18/22	
3	.	2	.	3	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(ALEL)	10/13/22	9/3/22	
3	.	2	.	3	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(ALEL)	10/27/22	11/17/22	
3	.	2	.	3	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(ALEL)	1/12/23	2/2/23	
3	.	2	.	3	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(ALEL)	1/26/23	2/16/23	
3	.	2	.	3	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(ALEL)	4/13/23	5/4/23	
3	.	2	.	3	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(ALEL)	4/27/23	5/18/23	
3	.	2	.	3	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(ALEL)	7/13/23	8/3/23	

## APPENDIX IV. DELIVERABLES SCHEDULE

SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name	Draft Date Due	Final Date Due		
1	.	1	.		Summary of REL Kickoff Meeting				
1	.	1	.	1	Summary of REL Kickoff Meeting	1/31/22	2/21/22		
1	.	2	.	1	Bimonthly call agendas				
1	.	2	.	1	Year 1 January Call 1	1/11/22	1/12/22		
1	.	2	.	1	Year 1 January Call 2	1/25/22	1/26/22		
1	.	2	.	1	Year 1 February Call 1	2/8/22	2/9/22		
1	.	2	.	1	Year 1 February Call 2	2/22/22	2/23/22		
1	.	2	.	1	Year 1 March Call 1	3/8/22	3/9/22		
1	.	2	.	1	Year 1 March Call 2	3/22/22	3/23/22		
1	.	2	.	1	Year 1 April Call 1	4/5/22	4/6/22		
1	.	2	.	1	Year 1 April Call 2	4/19/22	4/20/22		
1	.	2	.	1	Year 1 May Call 1	5/3/22	5/4/22		
1	.	2	.	1	Year 1 May Call 2	5/17/22	5/18/22		
1	.	2	.	1	Year 1 June Call 1	6/7/22	6/8/22		
1	.	2	.	1	Year 1 June Call 2	6/21/22	6/22/22		
1	.	2	.	1	Year 1 July Call 1	7/5/22	7/6/22		
1	.	2	.	1	Year 1 July Call 2	7/19/22	7/20/22		
1	.	2	.	1	Year 1 August Call 1	8/2/22	8/3/22		
1	.	2	.	1	Year 1 August Call 2	8/16/22	8/17/22		
1	.	2	.	1	Year 1 September Call 1	9/6/22	9/7/22		
1	.	2	.	1	Year 1 September Call 2	9/20/22	9/21/22		
1	.	2	.	1	Year 1 October Call 1	10/4/22	10/5/22		
1	.	2	.	1	Year 1 October Call 2	10/18/22	10/19/22		



SCHEDULE OF DELIVERABLES						
Deliverable #			Deliverable Name	Draft Date Due	Final Date Due	
1 . 2 . 1 . 21			Year 1 November Call 1	11/1/22	11/2/22	
1 . 2 . 1 . 22			Year 1 November Call 2	11/15/22	11/16/22	
1 . 2 . 1 . 23			Year 1 December Call 1	11/29/22	11/30/22	
1 . 2 . 1 . 24			Year 1 December Call 2	12/13/22	12/14/22	
1 . 2 . 1 . 25			Year 2 January Call 1	1/10/23	1/11/23	
1 . 2 . 1 . 26			Year 2 January Call 2	1/24/23	1/25/23	
1 . 2 . 1 . 27			Year 2 February Call 1	2/7/23	2/8/23	
1 . 2 . 1 . 28			Year 2 February Call 2	2/21/23	2/22/23	
1 . 2 . 1 . 29			Year 2 March Call 1	3/7/23	3/8/23	
1 . 2 . 1 . 30			Year 2 March Call 2	3/21/23	3/22/23	
1 . 2 . 1 . 31			Year 2 April Call 1	4/4/23	4/5/23	
1 . 2 . 1 . 32			Year 2 April Call 2	4/18/23	4/19/23	
1 . 2 . 1 . 33			Year 2 May Call 1	5/2/23	5/3/23	
1 . 2 . 1 . 34			Year 2 May Call 2	5/16/23	5/17/23	
1 . 2 . 1 . 35			Year 2 June Call 1	6/6/23	6/7/23	
1 . 2 . 1 . 36			Year 2 June Call 2	6/20/23	6/21/23	
1 . 2 . 2 .			Bimonthly call memos			
1 . 2 . 2 . 1			Year 1 January Call 1	1/18/22	2/8/22	
1 . 2 . 2 . 2			Year 1 January Call 2	2/1/22	2/22/22	
1 . 2 . 2 . 3			Year 1 February Call 1	2/15/22	3/8/22	
1 . 2 . 2 . 4			Year 1 February Call 2	3/1/22	3/22/22	
1 . 2 . 2 . 5			Year 1 March Call 1	3/15/22	4/5/22	
1 . 2 . 2 . 6			Year 1 March Call 2	3/29/22	4/19/22	
1 . 2 . 2 . 7			Year 1 April Call 1	4/12/22	5/3/22	
1 . 2 . 2 . 8			Year 1 April Call 2	4/26/22	5/17/22	

SCHEDULE OF DELIVERABLES						
Deliverable #			Deliverable Name	Draft Date Due	Final Date Due	
1 . 2 . 2 . 9			Year 1 May Call 1	5/10/22	5/31/22	
1 . 2 . 2 . 10			Year 1 May Call 2	5/24/22	6/14/22	
1 . 2 . 2 . 11			Year 1 June Call 1	6/14/22	7/5/22	
1 . 2 . 2 . 12			Year 1 June Call 2	6/28/22	7/19/22	
1 . 2 . 2 . 13			Year 1 July Call 1	7/12/22	8/2/22	
1 . 2 . 2 . 14			Year 1 July Call 2	7/26/22	8/16/22	
1 . 2 . 2 . 15			Year 1 August Call 1	8/9/22	8/30/22	
1 . 2 . 2 . 16			Year 1 August Call 2	8/23/22	9/13/22	
1 . 2 . 2 . 17			Year 1 September Call 1	9/13/22	10/4/22	
1 . 2 . 2 . 18			Year 1 September Call 2	9/27/22	10/18/22	
1 . 2 . 2 . 19			Year 1 October Call 1	10/11/22	11/11/22	
1 . 2 . 2 . 20			Year 1 October Call 2	10/25/22	11/15/22	
1 . 2 . 2 . 21			Year 1 November Call 1	11/8/22	11/29/22	
1 . 2 . 2 . 22			Year 1 November Call 2	11/22/22	12/13/22	
1 . 2 . 2 . 23			Year 1 December Call 1	12/6/22	12/27/22	
1 . 2 . 2 . 24			Year 1 December Call 2	12/20/22	1/10/23	
1 . 2 . 2 . 25			Year 2 January Call 1	1/17/23	2/7/23	
1 . 2 . 2 . 26			Year 2 January Call 2	1/31/23	2/21/23	
1 . 2 . 2 . 27			Year 2 February Call 1	2/14/23	3/7/23	
1 . 2 . 2 . 28			Year 2 February Call 2	2/28/23	3/21/23	
1 . 2 . 2 . 29			Year 2 March Call 1	3/14/23	4/4/23	
1 . 2 . 2 . 30			Year 2 March Call 2	3/28/23	4/18/23	
1 . 2 . 2 . 31			Year 2 April Call 1	4/11/23	5/2/23	
1 . 2 . 2 . 32			Year 2 April Call 2	4/25/23	5/16/23	
1 . 2 . 2 . 33			Year 2 May Call 1	5/9/23	5/30/23	

SCHEDULE OF DELIVERABLES										
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due
1	.	2	.	2	.	34		Year 2 May Call 2	5/23/23	6/13/23
1	.	2	.	2	.	35		Year 2 June Call 1	6/13/23	7/5/23
1	.	2	.	2	.	36		Year 2 June Call 2	6/27/23	7/18/23
1	.	4						Department presentation briefing materials		
1	.	4	.	1	.	1		Department presentation briefing materials - Year 1 first meeting	3 weeks before each meeting	
1	.	4	.	1	.	2		Department presentation briefing materials - Year 1 second meeting	3 weeks before each meeting	
1	.	4	.	1	.	3		Department presentation briefing materials - Year 2 first meeting	3 weeks before each meeting	
1	.	4	.	1	.	4		Summary of department presentation - Year 1 first meeting	1 week after each meeting	
1	.	4	.	1	.	5		Summary of department presentation - Year 1 second meeting	1 week after each meeting	
1	.	4	.	1	.	6		Summary of department presentation - Year 2 first meeting	1 week after each meeting	
1	.	5						Identify, establish, maintain and convene the Governing Board		
1	.	5		1	.	1		Report of the Establishment of the Governing Board	5 weeks after award	
1	.	5		2	.	1		Agenda and materials for Governing Board meeting - Year 1 Spring Governing Board meeting	3 weeks before meeting	
1	.	5		3	.	1		Meeting minutes and action items - Year 1 Spring Governing Board meeting	2 weeks after meeting	
1	.	5		2	.	2		Agenda and materials for Governing Board meeting - Year 1 Fall Governing Board meeting	3 weeks before meeting	
1	.	5		3	.	2		Meeting minutes and action items - Year 1 Fall Governing Board meeting	2 weeks after meeting	

SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name	Draft Date Due	Final Date Due		
1	.	5		2	3	Agenda and materials for Governing Board meeting - Year 2 Spring Governing Board meeting	3 weeks before meeting		
1	.	5		3	3	Meeting minutes and action items - Year 2 Spring Governing Board meeting	2 weeks after meeting		
1	.	6				Bi-Annual Assessment of Progress Report			
1	.	6		1	1	Bi-Annual Assessment of Progress Report	12 weeks after effective date of UAP		
1	.	6		1	2	Bi-Annual Assessment of Progress Report	10/31/22		11/21/22
1	.	6		1	3	Bi-Annual Assessment of Progress Report	4/28/23		5/19/23
1	.	7				Monthly Progress Report			
1	.	7	.	1	1	Year 1 January	2/8/22		3/1/22
1	.	7	.	1	2	Year 1 February	3/8/22		3/29/22
1	.	7	.	1	3	Year 1 March	4/8/22		4/22/22
1	.	7	.	1	4	Year 1 April	5/9/22		5/30/22
1	.	7	.	1	5	Year 1 May	6/8/22		6/29/22
1	.	7	.	1	6	Year 1 June	7/11/22		8/1/22
1	.	7	.	1	7	Year 1 July	8/8/22		8/29/22
1	.	7	.	1	8	Year 1 August	9/9/22		9/30/22
1	.	7	.	1	9	Year 1 September	10/10/22		10/31/22
1	.	7	.	1	10	Year 1 October	11/8/22		12/1/22
1	.	7	.	1	11	Year 1 November	12/8/22		12/23/22
1	.	7	.	1	12	Year 1 December	1/9/23		1/30/23
1	.	7	.	1	13	Year 2 January	2/8/23		3/1/23
1	.	7	.	1	14	Year 2 February	3/8/23		3/29/23
1	.	7	.	1	15	Year 2 March	4/10/23		5/1/23
1	.	7	.	1	16	Year 2 April	5/8/23		5/29/23

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SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name	Draft Date Due	Final Date Due		
1	.	7	.	1	17	Year 2 May	6/8/23	6/29/23	
1	.	7	.	1	18	Year 2 June	7/11/23	8/1/23	
1	.	8	.			Performance reporting			
1	.	8	.	1	1	Performance report 1	Upon request		
1	.	8	.	1	2	Performance report 2	Upon request		
1	.	8	.	1	3	Performance report 3	Upon request		
1	.	8	.	1	4	Performance report 4	Upon request		
1	.	8	.	1	5	Performance report 5	Upon request		
1	.	8	.	1	6	Performance report 6	Upon request		
1	.	8	.	1	7	Performance report 7	Upon request		
1	.	9	.			Submission of security documents for low and moderate level clearances			
1	.	9	.	1	1	Submission of security documents for low and moderate level clearances	As needed		
1	.	10	.			REL evaluation materials			
1	.	10	.	1	1	REL evaluation materials	Within two weeks of the effective date of the contract, as needed		
2	.	1	.			Lead cross-REL coordination activities			
2	.	1	.	1	1	Cross-REL working group agenda - Year 1 Quarter 2	2 weeks before meeting		
2	.	1	.	2	1	Cross-REL working group memo - Year 1 Quarter 2	2 weeks after meeting		
2	.	1	.	1	2	Cross-REL working group agenda - Year 1 Quarter 3	2 weeks before meeting		

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SCHEDULE OF DELIVERABLES												
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due		
2	.	1	.	2	.	2		Cross-REL working group memo - Year 1 Quarter 3	2 weeks after meeting			
2	.	1	.	1	.	3		Cross-REL working group agenda - Year 1 Quarter 4	2 weeks before meeting			
2	.	1	.	2	.	3		Cross-REL working group memo - Year 1 Quarter 4	2 weeks after meeting			
2	.	1	.	1	.	4		Cross-REL working group agenda - Year 2 Quarter 1	2 weeks before meeting			
2	.	1	.	2	.	4		Cross-REL working group memo - Year 2 Quarter 1	2 weeks after meeting			
2	.	1	.	1	.	5		Cross-REL working group agenda - Year 2 Quarter 2	2 weeks before meeting			
2	.	1	.	2	.	5		Cross-REL working group memo - Year 2 Quarter 2	2 weeks after meeting			
2	.	1	.	3	.	6		Proposal for Cross-REL, REL-only event	As needed			
2	.	1	.	4	.	6		Agenda and materials for cross REL, REL-only event	3 weeks before event			
2	.	1	.	5	.	1		Summary of cross-REL, REL-only event	2 weeks after event			
2	.	1						Cross-REL infographic or newsletter				
2	.	1	.	6	.	1		Proposal	11/30/22	12/21/22		
2	.	1	.	7	.	1		Cross-REL Working Group Fact Sheet	1/31/23			
2	.	3						Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments				
2	.	3	.	1	.	1		Signed letter(s) of intent with each regional CC in REL Region	Within 90 days of the effective date of the contract			
2	.	3	.	2	.	1		Annual memo of needs sensing between REL and CCs	1/31/23	2/21/23		

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SCHEDULE OF DELIVERABLES										
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due
2	.	3	.	3	.	1		Joint needs sensing summary meeting minutes	3/30/23	4/20/23
2	.	3	.	2	.	2		Annual memo of needs sensing between REL and CCs	1/31/24	2/21/24
2	.	3	.	3	.	2		Joint needs sensing summary meeting minutes	3/29/24	4/19/24
3	.	1						Conduct needs-sensing and develop partnerships		
								Partnership Proposal--South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)		
3	.	1	.	1	.	1			As needed	
3	.	1	.	1	.	1	2	Partnership Proposal--Mississippi Adolescent Literacy (MSAL)	As needed	
3	.	1	.	1	.	1	3	Partnership Proposal--Alabama Research Partnership on Improving English Learner Outcomes (ALEL)	As needed	
3	.	1	.	1	.	1	4	Partnership Proposal--Florida K-3 Literacy (FLK3)	As needed	
								Partnership Proposal--Florida Virtual School Partnership (FLVS)	As needed	
3	.	1	.	1	.	1	5	Partnership Proposal--School Climate and Literacy (SCAL4GA)	As needed	
3	.	1	.	1	.	1	6	Partnership Proposal--Measuring Success through Competency-Based Learning (NCCEE)	As needed	
3	.	1	.	1	.	1	7	Partnership Proposal--Post-secondary success at Historically Black Colleges and Universities (TPHBCU)	As needed	
3	.	1	.	1	.	1	8		As needed; 2 weeks before meeting	
3	.	1	.	2	.	*	*	Needs sensing meeting materials (Partnership TBD)	As needed; 2 weeks before meeting	
3	.	1	.	2	.	*	*	Needs sensing meeting materials (Partnership TBD)		

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SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name				
3	.	1	.	2	.	*	.	*	Needs sensing meeting materials (Partnership TBD)
3	.	1	.	2	.	*	.	*	Needs sensing meeting materials (Partnership TBD)
3	.	2	.	1	.		.		Maintain partnerships under subtask 3.1
3	.	2	.	1	.	*	.	*	South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)
3	.	2	.	1	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(SCPLC)
3	.	2	.	1	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(SCPLC)
3	.	2	.	1	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(SCPLC)
3	.	2	.	1	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(SCPLC)
3	.	2	.	1	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(SCPLC)
3	.	2	.	1	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(SCPLC)
3	.	2	.	1	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(SCPLC)
3	.	2	.	1	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(SCPLC)
3	.	2	.	1	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(SCPLC)
3	.	2	.	1	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(SCPLC)



SCHEDULE OF DELIVERABLES												
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due	
3	.	2	.	1	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(SCPLC)	7/13/23	8/3/23	
3	.	2	.	1	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(SCPLC)	7/27/23	8/17/23	
3	.	2	.	1	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(SCPLC)	11/30/22	12/21/23	
3	.	2	.	2	.	*	.	*	Mississippi Adolescent Literacy (MSAL)			
3	.	2	.	2	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(MSAL)	4/14/22	5/5/22	
3	.	2	.	2	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(MSAL)	4/28/22	5/19/22	
3	.	2	.	2	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(MSAL)	7/14/22	8/4/22	
3	.	2	.	2	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(MSAL)	7/28/22	8/18/22	
3	.	2	.	2	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(MSAL)	10/13/22	11/3/22	
3	.	2	.	2	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(MSAL)	10/27/22	11/17/22	
3	.	2	.	2	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(MSAL)	1/12/23	2/2/23	
3	.	2	.	2	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(MSAL)	1/26/23	2/16/23	
3	.	2	.	2	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(MSAL)	4/13/23	5/4/23	
3	.	2	.	2	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(MSAL)	4/27/23	5/18/23	
3	.	2	.	2	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(MSAL)	7/13/23	8/3/23	

SCHEDULE OF DELIVERABLES										
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due
3	.	2	.	2	.	6		Partner meeting summary memos for Year 2 Quarter 2--(MSAL)	7/27/23	8/17/23
3	.	2	.	2	.	3	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(MSAL)	11/30/23	12/14/23
3	.	2	.	3	.	*	*	Alabama Partnership on Improving English Learner Outcomes (ALEL)		
3	.	2	.	3	.	1	1	Partner meeting materials and agendas for Year 1 Quarter 1--(ALEL)	4/14/22	5/5/22
3	.	2	.	3	.	2	1	Partner meeting summary memos for Year 1 Quarter 1--(ALEL)	4/28/22	5/19/22
3	.	2	.	3	.	1	2	Partner meeting materials and agendas for Year 1 Quarter 2--(ALEL)	7/14/22	8/4/22
3	.	2	.	3	.	2	2	Partner meeting summary memos for Year 1 Quarter 2--(ALEL)	7/28/22	8/18/22
3	.	2	.	3	.	1	3	Partner meeting materials and agendas for Year 1 Quarter 3--(ALEL)	10/13/22	9/3/22
3	.	2	.	3	.	2	3	Partner meeting summary memos for Year 1 Quarter 3--(ALEL)	10/27/22	11/17/22
3	.	2	.	3	.	1	4	Partner meeting materials and agendas for Year 1 Quarter 4--(ALEL)	1/12/23	2/2/23
3	.	2	.	3	.	2	4	Partner meeting summary memos for Year 1 Quarter 4--(ALEL)	1/26/23	2/16/23
3	.	2	.	3	.	1	5	Partner meeting materials and agendas for Year 2 Quarter 1--(ALEL)	4/13/23	5/4/23
3	.	2	.	3	.	2	5	Partner meeting summary memos for Year 2 Quarter 1--(ALEL)	4/27/23	5/18/23
3	.	2	.	3	.	1	6	Partner meeting materials and agendas for Year 2 Quarter 2--(ALEL)	7/13/23	8/3/23

SCHEDULE OF DELIVERABLES												
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due	
3	.	2	.	3	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(ALEL)	7/27/23	8/17/23	
3	.	2	.	3	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(ALEL)	11/30/22	12/21/23	
3	.	2	.	4	.	*	.	*	Florida Panhandle K-3 Literacy (FLK3)			
3	.	2	.	4	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(FLK3)	4/14/22	5/5/22	
3	.	2	.	4	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(FLK3)	4/28/22	5/19/22	
3	.	2	.	4	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(FLK3)	7/14/22	8/4/22	
3	.	2	.	4	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(FLK3)	7/28/22	8/18/22	
3	.	2	.	4	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(FLK3)	10/13/22	9/3/22	
3	.	2	.	4	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(FLK3)	10/27/22	11/17/22	
3	.	2	.	4	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(FLK3)	1/12/23	2/2/23	
3	.	2	.	4	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(FLK3)	1/26/23	2/16/23	
3	.	2	.	4	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(FLK3)	4/13/23	5/4/23	
3	.	2	.	4	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(FLK3)	4/27/23	5/18/23	
3	.	2	.	4	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(FLK3)	7/13/23	8/3/23	
3	.	2	.	4	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(FLK3)	7/27/23	8/17/23	

SCHEDULE OF DELIVERABLES												
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due	
3	.	2	.	3	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(ALEL)	7/27/23	8/17/23	
3	.	2	.	3	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(ALEL)	11/30/22	12/21/23	
3	.	2	.	4	.	*	.	*	Florida Panhandle K-3 Literacy (FLK3)			
3	.	2	.	4	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(FLK3)	4/14/22	5/5/22	
3	.	2	.	4	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(FLK3)	4/28/22	5/19/22	
3	.	2	.	4	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(FLK3)	7/14/22	8/4/22	
3	.	2	.	4	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(FLK3)	7/28/22	8/18/22	
3	.	2	.	4	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(FLK3)	10/13/22	9/3/22	
3	.	2	.	4	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(FLK3)	10/27/22	11/17/22	
3	.	2	.	4	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(FLK3)	1/12/23	2/2/23	
3	.	2	.	4	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(FLK3)	1/26/23	2/16/23	
3	.	2	.	4	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(FLK3)	4/13/23	5/4/23	
3	.	2	.	4	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(FLK3)	4/27/23	5/18/23	
3	.	2	.	4	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(FLK3)	7/13/23	8/3/23	
3	.	2	.	4	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(FLK3)	7/27/23	8/17/23	

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SCHEDULE OF DELIVERABLES													
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due		
3	.	2	.	4	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(FLK3)	11/30/23	12/21/23		
3	.	2	.	5	.	*	.	*	Florida Virtual School Partnership (FLVS)				
3	.	2	.	5	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(FLVS)	4/14/22	5/5/22		
3	.	2	.	5	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(FLVS)	4/28/22	5/19/22		
3	.	2	.	5	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(FLVS)	7/14/22	8/4/22		
3	.	2	.	5	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(FLVS)	7/28/22	8/18/22		
3	.	2	.	5	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(FLVS)	10/13/22	9/3/22		
3	.	2	.	5	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(FLVS)	10/27/22	11/17/22		
3	.	2	.	5	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(FLVS)	1/12/23	2/2/23		
3	.	2	.	5	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(FLVS)	1/26/23	2/16/23		
3	.	2	.	5	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(FLVS)	4/13/23	5/4/23		
3	.	2	.	5	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(FLVS)	4/27/23	5/18/23		
3	.	2	.	5	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(FLVS)	7/13/23	8/3/23		
3	.	2	.	5	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(FLVS)	7/27/23	8/17/23		
3	.	2	.	5	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(FLVS)	11/30/23	12/21/23		

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SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name			Draft Date Due	Final Date Due
3	.	2	.	6	.	*	.	*	School Climate and Literacy for Georgia (SCAL4GA)
3	.	2	.	6	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(SCAL4GA)
3	.	2	.	6	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(SCAL4GA)
3	.	2	.	6	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(SCAL4GA)
3	.	2	.	6	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(SCAL4GA)
3	.	2	.	6	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(SCAL4GA)
3	.	2	.	6	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(SCAL4GA)
3	.	2	.	6	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(SCAL4GA)
3	.	2	.	6	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(SCAL4GA)
3	.	2	.	6	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(SCAL4GA)
3	.	2	.	6	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(SCAL4GA)
3	.	2	.	6	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(SCAL4GA)
3	.	2	.	6	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(SCAL4GA)
3	.	2	.	6	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(SCAL4GA)
3	.	2	.	7	.	*	.	*	Measuring Success through Competency Based Learning (NCCEE)

SCHEDULE OF DELIVERABLES													
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due		
3	.	2	.	7	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(NCCEE)	4/14/22	5/5/22		
3	.	2	.	7	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(NCCEE)	4/28/22	5/19/22		
3	.	2	.	7	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(NCCEE)	7/14/22	8/4/22		
3	.	2	.	7	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(NCCEE)	7/28/22	8/18/22		
3	.	2	.	7	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(NCCEE)	10/13/22	9/3/22		
3	.	2	.	7	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(NCCEE)	10/27/22	11/17/22		
3	.	2	.	7	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(NCCEE)	1/12/23	2/2/23		
3	.	2	.	7	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(NCCEE)	1/26/23	2/16/23		
3	.	2	.	7	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(NCCEE)	4/13/23	5/4/23		
3	.	2	.	7	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(NCCEE)	4/27/23	5/18/23		
3	.	2	.	7	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(NCCEE)	7/13/23	8/3/23		
3	.	2	.	7	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(NCCEE)	7/27/23	8/17/23		
3	.	2	.	7	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(NCCEE)	11/30/23	12/21/23		
3	.	2	.	8	.	*	.	*	Diversify the Teacher Pipeline with Historically Black Colleges and Universities (TPHBCU)				
3	.	2	.	8	.	1	.	1	Partner meeting materials and agendas for Year 1 Quarter 1--(TPHBCU)	4/14/22	5/5/22		

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SCHEDULE OF DELIVERABLES											
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due
3	.	2	.	8	.	2	.	1	Partner meeting summary memos for Year 1 Quarter 1--(TPHBCU)	4/28/22	5/19/22
3	.	2	.	8	.	1	.	2	Partner meeting materials and agendas for Year 1 Quarter 2--(TPHBCU)	7/14/22	8/4/22
3	.	2	.	8	.	2	.	2	Partner meeting summary memos for Year 1 Quarter 2--(TPHBCU)	7/28/22	8/18/22
3	.	2	.	8	.	1	.	3	Partner meeting materials and agendas for Year 1 Quarter 3--(TPHBCU)	10/13/22	9/3/22
3	.	2	.	8	.	2	.	3	Partner meeting summary memos for Year 1 Quarter 3--(TPHBCU)	10/27/22	11/17/22
3	.	2	.	8	.	1	.	4	Partner meeting materials and agendas for Year 1 Quarter 4--(TPHBCU)	1/12/23	2/2/23
3	.	2	.	8	.	2	.	4	Partner meeting summary memos for Year 1 Quarter 4--(TPHBCU)	1/26/23	2/16/23
3	.	2	.	8	.	1	.	5	Partner meeting materials and agendas for Year 2 Quarter 1--(TPHBCU)	4/13/23	5/4/23
3	.	2	.	8	.	2	.	5	Partner meeting summary memos for Year 2 Quarter 1--(TPHBCU)	4/27/23	5/18/23
3	.	2	.	8	.	1	.	6	Partner meeting materials and agendas for Year 2 Quarter 2--(TPHBCU)	7/13/23	8/3/23
3	.	2	.	8	.	2	.	6	Partner meeting summary memos for Year 2 Quarter 2--(TPHBCU)	7/27/23	8/17/23
3	.	2	.	8	.	3	.	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1--(TPHBCU)	11/30/23	12/21/23
4	.	1							TCTS Projects		
4	.	1	.	1	.	*	.	*	South Carolina Emergent Literacy Professional Learning Community		
4	.	1	.	1	.	2	.	1	Proposal	2/17/22	6/30/22



SCHEDULE OF DELIVERABLES									
Deliverable #						Deliverable Name	Draft Date Due	Final Date Due	
4	.	1	.	1	.	3	.	1	Materials and Agenda for TCTS Session 1
4	.	1	.	1	.	3	.	2	Materials and Agenda for TCTS Session 2
4	.	1	.	1	.	3	.	3	Materials and Agenda for TCTS Session 3
4	.	1	.	1	.	3	.	4	Materials and Agenda for TCTS Session 4
4	.	1	.	1	.	3	.	4	Materials and Agenda for TCTS Session 5
4	.	1	.	1	.	4	.	1	Stakeholder Feedback Survey
4	.	1	.	2	.	*	.	*	Adolescent Literacy Strategies Grades 4-12 Content Area Teachers
4	.	1	.	2	.	2	.	1	Proposal
4	.	1	.	2	.	3	.	1	Materials and Agenda for TCTS Session 1
4	.	1	.	2	.	3	.	2	Materials and Agenda for TCTS Session 2
4	.	1	.	2	.	3	.	3	Materials and Agenda for TCTS Session 3
4	.	1	.	2	.	3	.	4	Materials and Agenda for TCTS Session 4
4	.	1	.	2	.	3	.	5	Materials and Agenda for TCTS Session 5
4	.	1	.	2	.	3	.	6	Materials and Agenda for TCTS Session 6
4	.	1	.	2	.	4	.	1	Stakeholder Feedback Survey
4	.	1	.	2	.	3	.	7	Facilitators Guide
4	.	1	.	3	.	*	.	*	Evidence-Based Intervention Practices Grades 4-8 Literacy Intervention Teachers
4	.	1	.	3	.	2	.	1	Proposal
4	.	1	.	3	.	3	.	1	Materials and Agenda for Sessions 1-8 on Multisyllabic words and Vocabulary, both grade bands

SCHEDULE OF DELIVERABLES												
Deliverable #										Deliverable Name	Draft Date Due	Final Date Due
4	.	1	.	3	.	3	.	2	Materials and Agenda for Sessions 9-10 on Fluency, both grade bands		8/11/23	8/31/23
											10 working days after final event	25 working days after final event
4	.	1	.	3	.	4	.	1	Stakeholder Feedback Survey			
4	.	1	.	4	.	*	.	*	ALEL--Supporting Implementation of Practice Guide			
4	.	1	.	4	.	1	.	1	Concept Paper for ALEL--Supporting Implementation of Practice Guide		TBD	TBD
4	.	1	.	4	.	2	.	1	Proposal		TBD	TBD
4	.	1	.	4	.	3	.	1	Materials and Agenda for TCTS Sessions		TBD	TBD
											10 working days after final event	25 working days after final event
4	.	1	.	4	.	4	.	1	Stakeholder Feedback Survey			
4	.	1	.	5	.	*	.	*	FLK3 Implementation of K-3 Literacy Academies			
4	.	1	.	5	.	1	.	1	Concept Paper for FLK3 Implementation of K-3 Literacy Academies		TBD	TBD
4	.	1	.	5	.	2	.	1	Proposal		TBD	TBD
4	.	1	.	5	.	3	.	1	Materials and Agenda for TCTS Sessions		TBD	TBD
											10 working days after final event	25 working days after final event
4	.	1	.	5	.	4	.	1	Stakeholder Feedback Survey			
4	.	1	.	6	.	*	.	1	FLVS Identification of Needs			
4	.	1	.	6	.	1	.	1	Concept Paper for FLVS Identification of Needs		TBD	TBD
4	.	1	.	6	.	2	.	1	Proposal		TBD	TBD
4	.	1	.	6	.	3	.	1	Materials and Agenda for TCTS Sessions		TBD	TBD
											10 working days after final event	25 working days after final event
4	.	1	.	6	.	4	.	1	Stakeholder Feedback Survey			

SCHEDULE OF DELIVERABLES										
Deliverable #							Deliverable Name	Draft Date Due	Final Date Due	
4	.	1	.	7	.	*	.	*	SCAL4GA Exploring Relationship between School Climate and School Literacy	
4	.	1	.	7	.	1	.	1	Concept Paper for SCAL4GA Exploring Relationship between School Climate and School Literacy	TBD
4	.	1	.	7	.	2	.	1	Proposal	TBD
4	.	1	.	7	.	3	.	1	Materials and Agenda for TCTS Sessions	TBD
4	.	1	.	7	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event
4	.	1	.	8	.	*	.	*	NCCBE Implementation and Lessons Learned in CBE	
4	.	1	.	8	.	1	.	1	Concept Paper for NCCBE Implementation and Lessons Learned in CBE	TBD
4	.	1	.	8	.	2	.	1	Proposal	TBD
4	.	1	.	8	.	3	.	1	Materials and Agenda for TCTS Sessions	TBD
4	.	1	.	8	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event
4	.	1	.	9	.	*	.	*	TPHBCU Examination of Teacher Preparation Outcomes	
4	.	1	.	9	.	1	.	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes	TBD
4	.	1	.	9	.	2	.	1	Proposal	TBD
4	.	1	.	9	.	3	.	1	Materials and Agenda for TCTS Sessions	TBD
4	.	1	.	9	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event
4	.	1	.	10	.	*	.	*	TBD - Year 3 or later	TBD

SCHEDULE OF DELIVERABLES														
Deliverable #										Deliverable Name	Draft Date Due	Final Date Due		
4	.	1	.	10	.	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes				TBD	TBD		
4	.	1	.	10	.	2	.	1	Proposal				TBD	TBD
4	.	1	.	10	.	3	.	1	Materials and Agenda for TCTS Sessions				TBD	TBD
4	.	1	.	10	.	4	.	1	Stakeholder Feedback Survey				10 working days after final event	25 working days after final event
4	.	1	.	11	.	*	.	*	TBD - Year 3 or later				TBD	
4	.	1	.	11	.	1	.	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes				TBD	TBD
4	.	1	.	11	.	2	.	1	Proposal				TBD	TBD
4	.	1	.	11	.	3	.	1	Materials and Agenda for TCTS Sessions				TBD	TBD
4	.	1	.	11	.	4	.	1	Stakeholder Feedback Survey				10 working days after final event	25 working days after final event
4	.	1	.	12	.	*	.	*	TBD - Year 3 or later				TBD	
4	.	1	.	12	.	1	.	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes				TBD	TBD
4	.	1	.	12	.	2	.	1	Proposal				TBD	TBD
4	.	1	.	12	.	3	.	1	Materials and Agenda for TCTS Sessions				TBD	TBD
4	.	1	.	12	.	4	.	1	Stakeholder Feedback Survey				10 working days after final event	25 working days after final event
4	.	1	.	13	.	*	.	*	TBD - Year 3 or later				TBD	
4	.	1	.	13	.	1	.	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes				TBD	TBD
4	.	1	.	13	.	2	.	1	Proposal				TBD	TBD
4	.	1	.	13	.	3	.	1	Materials and Agenda for TCTS Sessions				TBD	TBD

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SCHEDULE OF DELIVERABLES														
Deliverable #						Deliverable Name						Draft Date Due	Final Date Due	
4	.	1	.	13	.	4	.	1	Stakeholder Feedback Survey				10 working days after final event	25 working days after final event
4	.	1	.	14	.	*	.	*	TBD - Starting Year 3				TBD	
4	.	1	.	14	.	1	.	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes				TBD	TBD
4	.	1	.	14	.	2	.	1	Proposal				TBD	TBD
4	.	1	.	14	.	3	.	1	Materials and Agenda for TCTS Sessions				TBD	TBD
4	.	1	.	14	.	4	.	1	Summary of Stakeholder Feedback Survey results session 1				10 working days after final event	25 working days after final event
4	.	2	.		.		.		Ask an Expert					
4	.	2	.	1	.	1	.		Memo outlying how the "Ask an Expert" service will be implemented				Within 8 weeks of the effective date of the contract	
4	.	2	.	2	.	1	.		Ask an Expert responses memo				5 working days after each meeting with the requestor	
4	.	2	.	2	.	2	.		Ask an Expert responses memo				5 working days after each meeting with the requestor	
4	.	2	.	2	.	3	.		Ask an Expert responses memo				5 working days after each meeting with the requestor	
4	.	2	.	2	.	4	.		Ask an Expert responses memo				5 working days after each meeting with the requestor	

SCHEDULE OF DELIVERABLES											
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due
4	.	2	.	2	.	5			Ask an Expert responses memo	5 working days after each meeting with the requestor	
4	.	2	.	2	.	6			Ask an Expert responses memo	5 working days after each meeting with the requestor	
5	.	1							Conduct original, empirical research and develop products		
5	.	1	.	1	.	*	.	*	Evaluating the Implementation of the Emergent Literacy PLC		
5	.	1	.	1	.	1	.	1	Concept Paper for Evaluating the Implementation of the Emergent Literacy PLC	If needed	
5	.	1	.	1	.	2	.	1	Proposal	3/31/22	8/31/22
5	.	1	.	1	.	3	.	1	Notice of IRB approval or exemption	9/30/22	10/21/22
5	.	1	.	1	.	4	.	1	Data Management Plan	3/31/22	4/22/22
5	.	1	.	1	.	5	.	1	OMB clearance package (if applicable to the study)	9/30/22	2/28/23
5	.	1	.	1	.	7	.	1	Research Report	3/31/25	2/28/26
5	.	1	.	2	.	*	.	*	Alabama Early Learning (ALEL)	TBD	
5	.	1	.	2	.	1	.	1	Concept Paper	TBD	
5	.	1	.	2	.	2	.	1	Proposal	TBD	
5	.	1	.	2	.	3	.	1	Notice of IRB approval or exemption	TBD	
5	.	1	.	2	.	4	.	1	Data Management Plan (if applicable to the study)	TBD	
5	.	1	.	2	.	5	.	1	OMB clearance package (if applicable to the study)	TBD	
5	.	1	.	2	.	6	.	1	Data sharing agreement or memorandum of understanding (optional)	TBD	
5	.	1	.	2	.	7	.	1	Research Report	TBD	

SCHEDULE OF DELIVERABLES													
Deliverable #									Deliverable Name	Draft Date Due	Final Date Due		
5	.	1	.	3	.	*	.	*	Toolkit Evaluation: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades				
5	.	1	.	3	.	1	.	1	Concept Paper for Evaluating the Implementation of the Emergent Literacy PLC	If needed			
5	.	1	.	3	.	2	.	1	Proposal Toolkit Evaluation	3/31/22	8/31/22		
5	.	1	.	3	.	3	.	1	Notice of IRB approval or exemption	12/16/22	1/13/23		
5	.	1	.	3	.	4	.	1	Data Management Plan	3/31/22	8/31/22		
5	.	1	.	3	.	5	.	1	OMB clearance package	8/31/22	1/13/23		
5	.	1	.	3	.	6	.	1	Data sharing agreement or memorandum of understanding	4/28/23	5/31/23		
5	.	1	.	3	.	7	.	1	Research Report	6/30/25	9/30/26		
5	.	1	.	4	.	*	.	*	TBD Year 3 or later	TBD			
5	.	1	.	4	.	1	.	1	Concept Paper	TBD			
5	.	1	.	4	.	2	.	1	Proposal	TBD			
5	.	1	.	4	.	3	.	1	Notice of IRB approval or exemption	TBD			
5	.	1	.	4	.	4	.	1	Data Management Plan (if applicable to the study)	TBD			
5	.	1	.	4	.	5	.	1	OMB clearance package (if applicable to the study)	TBD			
5	.	1	.	4	.	6	.	1	Data sharing agreement or memorandum of understanding (optional)	TBD			
5	.	1	.	4	.	7	.	1	Research Report	TBD			
5	.	1	.	5	.	*	.	*	TBD Year 3 or later	TBD			
5	.	1	.	5	.	1	.	1	Concept Paper	TBD			
5	.	1	.	5	.	2	.	1	Proposal	TBD			
5	.	1	.	5	.	3	.	1	Notice of IRB approval or exemption	TBD			
5	.	1	.	5	.	4	.	1	Data Management Plan (if applicable to the study)	TBD			
5	.	1	.	5	.	5	.	1	OMB clearance package (if applicable to the study)	TBD			

SCHEDULE OF DELIVERABLES												
Deliverable #						Deliverable Name				Draft Date Due	Final Date Due	
5	.	1	.	5	.	6	.	1	Data sharing agreement or memorandum of understanding (optional)	TBD		
5	.	1	.	5	.	7	.	1	Research Report	TBD		
5	.	1	.	6	.	*	.	*	TBD Year 3 or later	TBD		
5	.	1	.	6	.	1	.	1	Concept Paper	TBD		
5	.	1	.	6	.	2	.	1	Proposal	TBD		
5	.	1	.	6	.	3	.	1	Notice of IRB approval or exemption	TBD		
5	.	1	.	6	.	4	.	1	Data Management Plan (if applicable to the study)	TBD		
5	.	1	.	6	.	5	.	1	OMB clearance package (if applicable to the study)	TBD		
5	.	1	.	6	.	6	.	1	Data sharing agreement or memorandum of understanding (optional)	TBD		
5	.	1	.	6	.	7	.	1	Applied research written product	TBD		
5	.	2	.	1	.	*	.	*	Toolkit Design: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades			
5	.	2	.	1	.	2	.	1	Proposal Toolkit Development	1/24/22	5/16/22	
5	.	2	.	1	.	7	.	1	Component 1: Self-Study Guide	9/30/22	5/31/23	
5	.	2	.	1	.	7	.	2	Component 2: Facilitator Guide	9/30/22	5/31/23	
5	.	2	.	1	.	7	.	3	Component 3: Professional Development Module 1	10/31/22	9/30/23	
5	.	2	.	1	.	7	.	4	Component 3: Professional Development Module 2	12/16/22	11/30/23	
5	.	5	.		.		.		Conduct assessment of research study quality for ESSA compliance			
5	.	5	.	1	.	1	.	1	Concept Paper	As needed		
5	.	5	.	2	.	1	.	1	Proposal	As proposed		
5	.	5	.	3	.	1	.	1	Study review(s), peer reviewed by WWC contractor if reviewed using WWC standards	As proposed		



SCHEDULE OF DELIVERABLES													
Deliverable #										Deliverable Name	Draft Date Due	Final Date Due	
5	.	5	.	4	.	1	.	1	Summary memo and/or associated materials stakeholders			As proposed	
6	.	1	.		.		.		Develop website content				
6	.	1	.	1	.	1	.		Complete initial website templates			4 weeks after contract award	
6	.	1	.	2	.	1	.		Website updates - Year 1 Quarter 1			4/29/22	5/20/22
6	.	1	.	3	.	1	.		Website updates - Year 1 Quarter 2			7/29/22	8/19/22
6	.	1	.	4	.	1	.		Website updates - Year 1 Quarter 3			10/31/22	11/21/22
6	.	1	.	5	.	1	.		Website updates - Year 1 Quarter 4			1/31/23	2/21/23
6	.	1	.	6	.	1	.		Website updates - Year 2 Quarter 1			4/28/23	5/19/23
6	.	1	.	7	.	1	.		Website updates - Year 2 Quarter 2			7/31/23	8/21/23
6	.	2	.		.		.		Social Media Updates				
6	.	2	.	1	.	1	.		Social media updates for Year 1 Quarter 1			4/29/22	5/20/22
6	.	2	.	2	.	1	.		Social media updates for Year 1 Quarter 2			7/29/22	8/19/22
6	.	2	.	3	.	1	.		Social media updates for Year 1 Quarter 3			10/31/22	11/21/22
6	.	2	.	4	.	1	.		Social media updates for Year 1 Quarter 4			1/31/23	2/21/23
6	.	2	.	5	.	1	.		Social media updates for Year 2 Quarter 1			4/28/23	5/19/23
6	.	2	.	6	.	6	.		Social media updates for Year 2 Quarter 2			7/31/23	8/21/23
	.		.		.		.		Infographics				
6	.	2	.	5	.	1	.		Infographic 1			4/29/22	5/20/22
6	.	2	.	5	.	2	.		Infographic 2			7/29/22	8/19/22
6	.	2	.	5	.	3	.		Infographic 3			10/31/22	11/21/22
6	.	2	.	5	.	4	.		Infographic 4			1/31/23	2/21/23
6	.	2	.	5	.	5	.		Infographic 5			4/28/23	5/19/23
6	.	2	.	5	.	6	.		Infographic 6			2/28/23	3/21/23

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SCHEDULE OF DELIVERABLES									
Deliverable #					Deliverable Name	Draft Date Due	Final Date Due		
6	.	2	.	5	7	Infographic 7	3/30/23	4/20/23	
6	.	2	.	5	8	Infographic 8	5/31/23	6/21/23	
6	.	2	.	5	9	Infographic 9	6/29/23	7/21/23	
						Audio Files			
6	.	2	.	16	1	Concept Paper	As needed		
6	.	2	.	15	2	Script and Storyboard audio file 1	4/28/22	5/19/23	
6	.	2	.	15	3	Audio file 1	7/28/22	8/18/22	
6	.	2	.	16	1	Script and Storyboard audio file 2	6/30/22	7/21/22	
6	.	2	.	16	2	Audio file 2	9/29/22	10/20/22	
6	.	2	.	17	1	Script and Storyboard audio file 3	4/28/23	5/19/23	
6	.	2	.	17	2	Audio file 3	5/31/23	6/21/23	
6	.	3	.			Host events and conference presentations			
6	.	3	.	1	1	Proposal for event or required proposal for conference presentation	TBD	TBD	
6	.	3	.	1	2	Agenda and materials	2 weeks before event	TBD	
6	.	3	.	1	3	Stakeholder feedback survey	2 weeks after event	TBD	
6	.	3	.	2	1	Proposal for event or required proposal for conference presentation	TBD	TBD	
6	.	3	.	2	2	Agenda and materials	2 weeks before event	TBD	
6	.	3	.	2	3	Stakeholder feedback survey	2 weeks after event	TBD	
6	.	3	.	3	1	Proposal for event or required proposal for conference presentation	TBD	TBD	
6	.	3	.	3	2	Agenda and materials	2 weeks before event	TBD	

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SCHEDULE OF DELIVERABLES										
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due
6	.	3	.	3	.	3		Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	4	.	1		Proposal for event or required proposal for conference presentation	TBD	TBD
6	.	3	.	4	.	2		Agenda and materials	2 weeks before event	TBD
6	.	3	.	4	.	3		Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	5	.	1		Proposal for event or required proposal for conference presentation	TBD	TBD
6	.	3	.	5	.	2		Agenda and materials	2 weeks before event	TBD
6	.	3	.	5	.	3		Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	6	.	1		Proposal for event or required proposal for conference presentation	TBD	TBD
6	.	3	.	6	.	2		Agenda and materials	2 weeks before event	TBD
6	.	3	.	6	.	3		Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	7	.	1		Proposal for event or required proposal for conference presentation	TBD	TBD
6	.	3	.	7	.	2		Agenda and materials	2 weeks before event	TBD
6	.	3	.	7	.	3		Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	8	.	1		Proposal for event or required proposal for conference presentation	TBD	TBD
6	.	3	.	8	.	2		Agenda and materials	2 weeks before event	TBD

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SCHEDULE OF DELIVERABLES									
Deliverable #							Deliverable Name	Draft Date Due	Final Date Due
6	.	3	.	8	.	3	Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	9	.	1	Proposal for event or required proposal for conference presentation	TBD	TBD
6	.	3	.	9	.	2	Agenda and materials	2 weeks before event	TBD
6	.	3	.	9	.	3	Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	10	.	1	Proposal for event or required proposal for conference presentation	TBD	TBD
6	.	3	.	10	.	2	Agenda and materials	2 weeks before event	TBD
6	.	3	.	10	.	3	Stakeholder feedback survey	2 weeks after event	TBD
6	.	3	.	11	.	1	Proposal for event or required proposal for conference presentation	As needed	TBD
6	.	3	.	11	.	2	Agenda and materials	2 weeks before event	TBD
6	.	3	.	11	.	3	Stakeholder feedback survey	2 weeks after event	TBD
6	.	4	.		.		Newsletters		
6	.	4	.	2	.	1	Newsletter 1 Year 1 Quarter 1	4/29/22	5/20/22
6	.	4	.	2	.	2	Newsletter 2 Year 1 Quarter 2	7/29/22	8/19/22
6	.	4	.	2	.	3	Newsletter 3 Year 1 Quarter 3	10/31/22	11/21/22
6	.	4	.	2	.	4	Newsletter 4 Year 1 Quarter 4	1/31/23	2/21/23
6	.	4	.	2	.	5	Newsletter 5 Year 2 Quarter 1	4/28/23	5/19/23
6	.	4	.	2	.	6	Newsletter 6 Year 2 Quarter 2	7/31/23	8/21/23
6	.	5	.		.		Maintain a blog		

SCHEDULE OF DELIVERABLES										
Deliverable #								Deliverable Name	Draft Date Due	Final Date Due
6	.	5	.	2	.	1		Blog 1 Year 1 Quarter 1	4/29/22	5/20/22
6	.	5	.	2	.	2		Blog 2 Year 1 Quarter 2	7/29/22	8/19/22
6	.	5	.	2	.	3		Blog 3 Year 1 Quarter 3	10/31/22	11/21/22
6	.	5	.	2	.	4		Blog 4 Year 1 Quarter 4	1/31/23	2/21/23
6	.	5	.	2	.	5		Blog 5 Year 2 Quarter 1	4/28/23	5/19/23
6	.	5	.	2	.	6		Blog 6 Year 2 Quarter 2	7/31/23	8/21/23
6	.	6						Maintain a social media presence		
6	.	6	.	2	.	1		Tweet 1 Year 1 Quarter 1	4/29/22	5/20/22
6	.	6	.	2	.	2		Tweet 2 Year 1 Quarter 2	7/29/22	8/19/22
6	.	6	.	2	.	3		Tweet 3 Year 1 Quarter 3	10/31/22	11/21/22
6	.	6	.	2	.	4		Tweet 4 Year 1 Quarter 4	1/31/23	2/21/23
6	.	6	.	2	.	5		Tweet 5 Year 2 Quarter 1	4/28/23	5/19/23
6	.	6	.	2	.	6		Tweet 6 Year 2 Quarter 2	7/31/23	8/21/23
6	.	7						Videos		
6	.	7	.	1	.	1		Script for video 1	6/30/22	7/22/22
6	.	7	.	1	.	1		Video 1	7/26/22	8/16/22
6	.	7	.	1	.	2		Script for video 2	11/16/22	12/9/22
6	.	7	.	1	.	2		Video 2	1/31/23	2/15/23
6	.	7	.	1	.	3		Script for video 3	2/28/23	3/21/23
6	.	7	.	1	.	3		Video 3	3/30/23	4/20/23
6	.	7	.	1	.	4		Script for video 4	4/28/23	5/19/23
6	.	7	.	1	.	4		Video 4	5/31/23	6/21/23

## Key Personnel

<u>Name</u>	<u>Position</u>
Nicole Patton Terry, Ph.D.	Director, Task 1 and 2 Lead
John Hughes, Ph.D.	Deputy Director, Task 3 Lead
Kevin Smith, M.S.	Task 4 Lead
Sharon Koon, Ph.D.	Task 5 Lead
Jennifer Dombek, Ph.D.	Task 6 Lead

